



United Way of San Antonio
and Bexar County

STRONG INDIVIDUALS AND FAMILIES IMPACT COUNCIL

REQUEST FOR PROPOSAL PROCESS GUIDE

September 2018



**STRONG INDIVIDUALS AND FAMILIES IMPACT COUNCIL
REQUEST FOR PROPOSAL
PROCESS GUIDE**

OVERVIEW

United Way of San Antonio and Bexar County (United Way) is a strategic, mission-driven organization with a clear goal: help all community members achieve and maintain self-sufficiency to the greatest extent possible. Our mission is to increase the organized capacity of people to care for one another. Based on our history of investing in key issues and our knowledge gained from current national level research and local community assessments, United Way has selected Ready Children, Successful Students, Strong Individuals and Families and Safety Net Services as areas of significant need in our community and will invest in strategies designed to achieve results in each of these areas.

Our investments will be guided by Impact Councils comprised of community leaders, content experts, residents, funders and public sector representatives committed to United Way's goal. Requests for Proposals (RFP) will be issued for each of the Impact Councils. Agencies may submit proposals in any or all of the impact areas and may submit multiple proposals per Impact Council. Final funding decisions will be approved by the Executive Committee and Board of Trustees.

United Way is aligning its priorities to leverage impact and improve outcomes at a greater scale. To that end, any agency funded through this RFP will become a member of the Strong Individuals and Families Impact Council and will work collectively with other agencies and community members to achieve the result.

STRONG INDIVIDUALS AND FAMILIES IMPACT COUNCIL

United Way's Strong Individuals and Families Impact Council seeks programs and/or initiatives that ensure all individuals and families are stable, flourish economically, reach their full potential and maintain a quality of life free of discrimination. This RFP seeks applicants who can meet all required criteria and deliver services as described in this process guide.

All proposals must be submitted via e-CImpact. The *User Guide to e-CImpact* is available at www.unitedwaysatx.org/rfp. This guide describes how to register for e-CImpact, access the RFP, upload documents and submit completed proposals.

Each proposal will be reviewed by volunteer review teams to:

- ensure the agency meets Eligibility Requirements and Partner Standards (pp. 5-7)
- evaluate the proposal based on the RFP scoring rubric (pp. 12-13).

For consideration of funding, all proposals must be complete, including all required attachments and signatures, and submitted via e-CImpact by Thursday, November 15, 2018 at 12:00 noon CST. Proposals not submitted via e-CImpact by the deadline will not be eligible for consideration.

TIMELINE

October 1, 2018	Request for Proposal released in e-CImpact
October 3 - 5, 2018	Bidders Conference Sessions: <ul style="list-style-type: none">• Wednesday, October 3, 2018 1:30 pm – 3:30 pm• Thursday, October 4, 2018 9:00 am – 11:00 am• Thursday, October 4, 2018 1:30 pm – 3:30 pm• Friday, October 5, 2018 9:00 am – 11:00 am
October 9, 2018	Technical Assistance Sessions: <ul style="list-style-type: none">• Tuesday, October 9, 2018 8:30 am – 11:00 am• Tuesday, October 9, 2018 1:30 pm – 4:00 pm
October 11 - 12, 2018	Performance Measure Assistance Sessions: <ul style="list-style-type: none">• Thursday, October 11, 2018 1:00 pm – 2:30 pm• Thursday, October 11, 2018 3:00 pm – 4:30 pm• Friday, October 12, 2018 8:30 am – 10:00 am• Friday, October 12, 2018 10:30 am – 12:00 pm
October 3 - November 4, 2018	Question and Answer Period
November 5 - 16, 2018	Blackout Period (Exception for questions regarding e-CImpact)
November 14, 2018 at 5:00 pm	Blackout Period for e-CImpact
November 15, 2018	RFP Deadline - must be submitted by 12:00 noon CST
December 2018 – March 2019	RFP Review by Impact Council Volunteer Review Team
March – April 2019	Executive Committee and Board Approval
April 2019	Applicants notified regarding outcome of RFP process
May 2019	Selected applicants notified of funding amount; Contracts negotiated and issued
July 1, 2019	Grant Start Date; Funded agencies join Impact Council

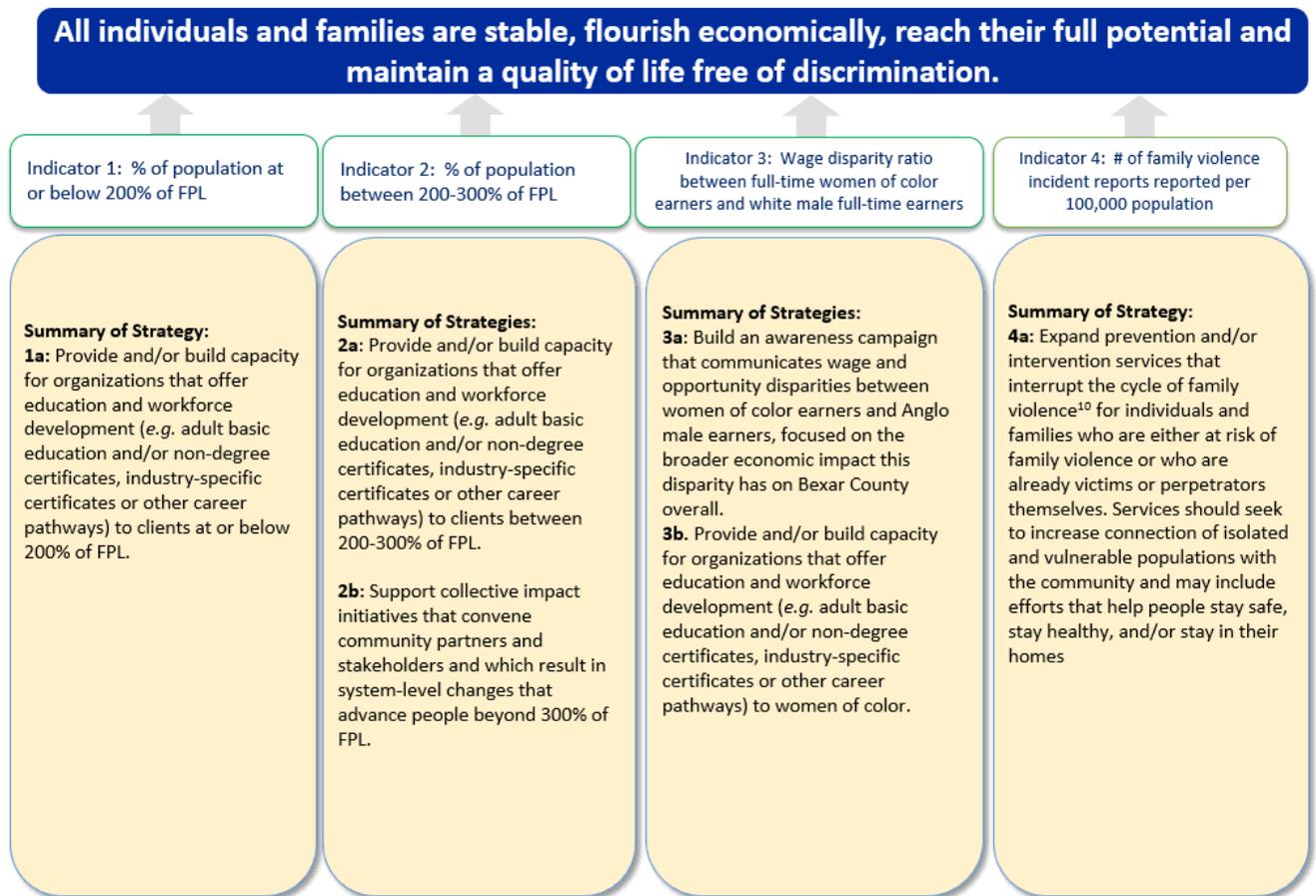
STRONG INDIVIDUALS AND FAMILIES IMPACT COUNCIL REQUEST FOR PROPOSAL

SOLICITATION SUMMARY

SCOPE OF WORK:

United Way’s Strong Individuals and Families Impact Council seeks proposals that support the result, indicators and strategies outlined in the summary below. The full scope of work, including complete strategies, details, specific target populations and funding details are identified in Appendix A at the end of this guide. Successful proposals may be evidence-based, promising practices and/or opportunities for innovation.

Strong Individuals and Families Impact Council Summary of Result, Indicators and Strategies



FUNDING DETAILS:

For the Strong Individuals and Families Impact Council RFP, United Way will award contracts to successful proposals for a period of up to five years, pending performance and with an annual contract review and/or an opportunity to renegotiate the contract. Applicants may apply to one or more indicator(s) and one or more of the corresponding strategy(ies) via one proposal, so long as each indicator selected and each strategy selected is addressed thoroughly. Total funding available for this RFP is \$5 million annually.

ELIGIBILITY REQUIREMENTS:

Applicant must:

- Have an IRS 501(c)(3) determination letter dated prior to January 1, 2016
- Provide health and human services primarily in Bexar County
- Have the capacity to track program performance metrics and finances on a monthly basis
- Have the ability to procure and track the required co-investment for the proposed program
- Agree to participate in a shared data system following the initial year of funding
- Agree to participate in the Impact Council through which the program is funded

The following are not eligible for United Way funding:

- Services that are principally religious or sectarian in character
- Services which support or promote the arts "for the arts' sake"
- Programs devoted primarily to the political advocacy of special causes or populations
- Services normally deemed to be the mandated responsibility of government
- Costs associated with capital improvements

PARTNER STANDARDS¹:

United Way's Partner Standards reflect the values that characterize United Way and all its funded agencies. They are designed to assure donors that agencies operating United Way-funded programs are: administered efficiently, financially accountable, funded by both United Way and non-United Way resources and effectively governed by a volunteer Board of Directors or Trustees.

In order to obtain United Way funding, an agency will successfully compete in response to an RFP published by United Way and be awarded funding, or be invited to apply for a specific need that addresses United Way priority areas.

Each agency submitting a proposal will be evaluated for compliance with the following standards to be considered for and receive United Way funding:

1. The agency must be a provider of services that address the human care or health needs of people principally residing in Bexar County. The following are deemed outside the purview of United Way funding:
 - services that are principally religious or sectarian in character
 - services which support or promote the arts "for the arts' sake"
 - programs devoted primarily to the political advocacy of special causes or populations
 - services normally deemed to be the mandated responsibility of government
2. The agency's program services approved for funding by United Way will be targeted at a clearly defined population and/or geographic area and should be consistent with United Way's stated priorities.

¹ The *Community Investments and Funds Distribution Manual* Outlines United Way of San Antonio and Bexar County's policies and procedures in the distribution and allocation of funds available through the annual fundraising campaign. This manual is currently being revised. In cases where procedures and requirements stated in this RFP differ from the manual, the RFP supersedes the manual.

3. The agency must show proof of incorporation as a nonprofit corporation or be an affiliate of a corporation having a nonprofit charter in Texas or in the United States. The agency must show proof of tax-exempt status as determined by the IRS under section 501(c)(3) of the Internal Revenue Code or be exempt from payment of income taxes under other appropriate provisions of the Internal Revenue Code.
4. The agency will be governed by an autonomous volunteer Board of Directors or Trustees with the authority, diversity and size to effectively represent, set policy for, govern and assure the financial support of the organization.

When the agency is the local arm of a governing body at the statewide or national level, the local organization must have its own governing body that provides volunteer oversight that meets these criteria. This requirement may be waived at the discretion of the United Way Executive Committee.

5. The agency will have an established staff person, paid or unpaid, who is charged with administering the organization's programs.
6. To be eligible to receive United Way funding, the agency must have been in operation and providing services for a minimum of two years on the first day of January prior to the fiscal year for which affiliation is requested as evidenced by two years of filing IRS form 990 or 990EZ or 990N.
7. The agency must provide and manage its program services effectively and efficiently. Its management and general and fundraising costs may not exceed 25% of the agency's total operating budget.
8. The agency must be able to demonstrate its development of significant financial and volunteer support from non-United Way resources.
9. The agency must certify that it meets all applicable requirements of local, state and/or federal government concerning credentialing, accreditation and/or licensing. This also includes written nondiscrimination and conflict of interest policies in the provision of its services and in the selection of Board, volunteers and committee members and in the employment of staff.
10. The agency must consent to the full disclosure of its financial condition when necessary or requested.
11. The agency must participate in monthly, quarterly and/or annual reviews of program performance, program budget and other deliverables as specified in contract agreement(s) and/or by United Way volunteers.
12. The agency must participate in an annual review to ensure it is:
 - a. administered efficiently
 - b. financially accountable
 - c. developing non-United Way resources
 - d. effectively governed by a volunteer Board of Directors or Trustees
13. The agency will submit an annual proposal to be included in all public sector campaigns (ex: State Employee Charitable Campaign, San Antonio Metropolitan Area Campaign).

14. Additional requirements of funded agencies include but are not limited to:
 - a. conduct an annual United Way Pacesetter campaign for all employees
 - b. representatives of the agency will be available to assist in the annual campaign by making staff available for the Campaign Speaker's Bureau and other requests
 - c. immediate notification to United Way of Executive Management or Board Chair changes and/or IRS issues
 - d. participation in United Way-sponsored volunteer events
 - e. use of United Way logo on all public materials
 - f. participation of agency CEO in semi-annual United Way Agency meetings
 - g. participation of agency representative on the Impact Council in which program is funded
 - h. timely notification of changes in agency by-laws

Benefits of being a United Way-funded agency include:

- a. inclusion as a supported agency in the United Way campaign and other materials
 - b. opportunities to promote United Way-funded programs in the annual campaign
 - c. inclusion in all state, county, municipal, school district and other special campaigns that United Way manages or in which United Way participates
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INDEPENDENT vs JOINT APPLICATION

United Way will accept independent and/or joint applications based on the preference of the applicant, applicant's partnerships and ability to collaborate and the best use of funds to help turn the curve on the result and indicators. Below are guiding questions to help determine if an agency should apply as an independent applicant or as part of a joint application.

Considerations for an Independent Application

1. Does the agency have a successful history of implementing the proposed program or a similar one?
2. Does the agency have the ability to co-invest in this program? United Way will not fund 100% of any program and will require a 50% co-investment. Exceptions may be considered for innovative or start-up programs.
3. Will this program be most successful with a single agency implementing the program?
4. Does the agency's key leadership support this program?
5. Does the agency have a sustainability plan to continue to operate this program regardless of receiving United Way funding?

Considerations for a Joint Application

1. Does the agency currently have a formal partnership with other agencies who are working towards the same goal?
2. Is there a clear lead applicant that can represent the collaborative in this joint application?
3. Does the agency understand the collective impact model and the backbone/lead applicant role required for a joint application?
4. Does the agency rely on other partners to co-invest in this program? United Way will not fund 100% of any programs and will require a 50% co-investment. Exceptions may be considered for innovative or start-up programs.
5. Does the proposed program have more value-add by including other partners? (*i.e.*, wider array of services, outreach opportunities, etc.)
6. Does the agency have a sustainability plan that includes other agencies to continue to operate this program regardless of receiving United Way funding?

Additional points to consider:

- Joint funding will be considered only for applicants in which two or more agencies share responsibility for delivering performance measures.
 - Preference will be given to collaborations that are better positioned to achieve performance targets, more effectively address the needs of the target population and which leverage greater resources than if operated by a single applicant.
 - Partners in a joint application should identify a lead agency which has overall responsibility for managing the collaboration as outlined in the required Memorandum of Understanding (MOU). MOU must include:
 - Each partner's financial and programmatic commitment to the proposed effort
 - How each partner's existing vision, theory of change, theory of action and current activities align with the proposed effort
 - Proposed governance structure, including a system for holding partners accountable and description of how residents/clients will have an active role in the collaboration's decision making.
 - United Way is not obligated to fund all partners in a joint application.
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QUESTION AND ANSWER PERIOD:

The Question and Answer period is October 3 - November 4, 2018. This period will provide applicants an opportunity to submit any technical or clarifying questions regarding the RFP.

Questions may be asked at Bidders Conference sessions held the week of October 3, 2018 or via e-mail to rfpfamilies@unitedwaysatx.org October 3 - November 4, 2018. Responses will be posted online at www.unitedwaysatx.org/rfp every Monday and Thursday beginning Thursday, October 11, 2018. No questions will be accepted after 5:00 pm CST on Sunday, November 4, 2018. This does not apply to questions regarding e-CImpact. The Blackout Period for e-CImpact begins at 5:00 pm on Wednesday, November 14, 2018.

BIDDERS CONFERENCE:

United Way will host Bidders Conference sessions the week of October 3, 2018. Applicants are not required to attend the Bidders Conference, but are strongly encouraged as it will provide an opportunity to gain knowledge of the Strategic Alignment process, Results Based Accountability and additional details of the RFP. All questions will be documented and answers will be shared online at www.unitedwaysatx.org/rfp.

Each agency may register up to two staff or board representatives for the sessions. Location varies by session. All attendees must register at www.unitedwaysatx.org/rfp.

Bidders Conference Schedule:

Wednesday, October 3, 2018	1:30 pm – 3:30 pm
Thursday, October 4, 2018	9:00 am – 11:00 am
Thursday, October 4, 2018	1:30 pm – 3:30 pm
Friday, October 5, 2018	9:00 am – 11:00 am

TECHNICAL ASSISTANCE:

United Way will host two Technical Assistance sessions October 10, 2018 for the Strong Individuals and Families RFP. These sessions will be facilitated by STAR FORCE and are designed to provide any assistance on the RFP templates and program proposals.

Applicants are not required to attend the TA sessions, but are strongly encouraged. Each agency may register up to two staff or board representatives for the sessions. All attendees must register at www.unitedwaysatx.org/rfp.

Strong Individuals and Families Technical Assistance Schedule:

Tuesday, October 9, 2018	8:30 am – 11:00 am
Tuesday, October 9, 2018	1:30 pm – 4:00 pm

PERFORMANCE MEASURE ASSISTANCE:

Performance Measure Assistance sessions will be offered October 11 – 12, 2018. These optional sessions will focus strictly on developing program performance measures. All attendees must register at www.unitedwaysatx.org/rfp.

Performance Measure Assistance Schedule:

Thursday, October 11, 2018	1:00 pm – 2:30 pm
Thursday, October 11, 2018	3:00 pm – 4:30 pm
Friday, October 12, 2018	8:30 am – 10:00 am
Friday, October 12, 2018	10:30 am – 12:00 pm

ADDITIONAL RESOURCES:

The following documents are available at www.unitedwaysatx.org/rfp.

- Impact Council Result, Indicators and Strategies
- Request for Proposal Process Guide
- Independent and Joint Application Comparison
- Implementation Plan Template
- Joint Application Budget Spreadsheet
- Checklists for Independent and Joint Applications
- Frequently Asked Questions
- User Guide to e-CImpact

REQUIRED DOCUMENTS (to be uploaded in e-CImpact):

The following documents are required and must be uploaded in e-CImpact. These documents will be reviewed by United Way volunteers to determine if the agency meets United Way's Partner Standards.

- Copy of IRS 501(c)(3) Determination Letter
- Articles of Incorporation and/or Certificate of Incorporation and any Amendments
- By-Laws
- Documentation of DBA (if applicable)
- Statement of Non-discrimination
- Proof of Insurance
- Current Board of Directors roster that includes end of current term, professional field/experience, gender and ethnicity for each member
- Current Organizational Chart
- Most Recent Audited Financial Statements (Must include Statement of Financial Position, Statement of Revenues and Expenses, Statement of Cash Flows and Footnotes.) If the agency's annual operating budget is \$250,000 or less and the agency does not have an audit, it may submit financial statements that have been reviewed by an independent Certified Public Accountant (CPA). United Way expects the audit/review would be complete within four months of the agency's fiscal year end.
- Single Audit (if applicable)
- Most Recent IRS Form 990
- Implementation Plan Template
- Joint Application Budget Spreadsheet (required for Joint Applications)
- Letter(s) of support (required for Independent Applications that indicate an existing informal partnership; one letter per partner)
- Memorandum of Understanding (required for Joint Applications)
- Checklist with signatures of Board Chair and CEO

Instructions for uploading required documents may be found in the *User Guide to e-CImpact* at www.unitedwaysatx.org/rfp.

BUDGET AND BUDGET NARRATIVE:

United Way will provide up to 50% of funds needed to operate the program. This may include an indirect rate not to exceed 10% of the subtotal of program expenses requested from United Way. Funds may not be used for capital improvements.

All applicants must provide a full program budget and budget narrative (including revenue and expenses) as outlined in the RFP. Funds requested should be based on the cost to provide services for a one-year (12 month) period beginning July 1, 2019 and ending June 30, 2020.

United Way reserves the right to award funding in the amount determined by the United Way Board of Trustees. Applicants awarded funding in an amount different from that requested will have the opportunity to revise their performance projections and budget during the contract negotiation process.

PROGRAM EVALUATION AND REPORTING:

Monthly, quarterly and annual reports will be required for all funded programs. Applicants must submit monthly program metrics and narrative and quarterly program narrative and financial reports via e-CImpact. Due dates for reporting will be included in final contracts for successful proposals.

If the funded agency fails to submit the performance or financial reports by the due date or the program performance metrics are not on target or contract requirements are not met for two consecutive months, the funded agency and United Way will jointly build a plan of action. United Way may temporarily suspend funding or place funding on a month-to-month basis when there is sufficient cause to be concerned about program performance reporting or financial accountability.

RFP SUBMISSION PROCESS AND DEADLINE:

Respondents must submit the RFP electronically via e-CImpact by Thursday, November 15, 2018 at 12:00 noon CST. Details regarding the submission process may be found in *the User Guide to e-CImpact* at www.unitedwaysatx.org/rfp.

United Way will not accept:

- incomplete proposals
- proposals submitted via mail/e-mail or delivered in person
- proposals submitted after the deadline.

RFP CHANGES AND RE-SUBMISSION:

Proposals may be modified provided such modifications are received prior to the RFP deadline. Modified proposals must be submitted via e-CImpact in the same manner as the original proposal. No oral statement of any person shall modify or otherwise change or affect the terms, conditions or specifications stated in the RFP.

To re-open a proposal for changes prior to the RFP due date, please e-mail the e-CImpact Administrator at CTyler@unitedwaysatx.org. For all other questions, please e-mail rpfamilies@unitedwaysatx.org.

EVALUATION OF RFP CRITERIA:

The volunteer review team will conduct a comprehensive, fair and impartial evaluation of all proposals which comply with United Way’s Partner Standards. Each proposal will be analyzed to determine overall responsiveness and qualifications under the RFP using the scoring rubrics below. Volunteer review teams may request additional information or in-person meetings with applicants at any time prior to final approval of a selected applicant.

STRONG INDIVIDUALS AND FAMILIES SCORING RUBRIC - INDEPENDENT APPLICATION			
Agency: _____			
Program: _____			
Indicator: _____			
Volunteer: _____			
Date: _____			
Section	Max Points	Points Scored	Comments
Organization’s Capacity (Questions 1-5)	21		
▪ Mission/Vision alignment with program(s)	4		
▪ Program(s) alignment with result, indicator(s) and strategy(ies)	5		
▪ Support from key agency leadership	4		
▪ Experience measuring impact	4		
▪ Value of Impact Council participation	4		
Program Design (Questions 6-12)	31		
▪ Problem the program(s) will address	3		
▪ Population to be served	3		
▪ Purpose of funding	3		
▪ Community Involvement	4		
▪ Indicators of success for new or existing programs	7		
▪ Partnerships to achieve results	6		
▪ Implementation plan	5		
Performance Measures & Evaluation (Question 13)	20		
▪ Short and long-term impact proposed	10		
▪ Performance Measures and Targets	10		
Budget, Narrative and Co-investment Funds (Question 14)	18		
▪ Overall Budget	7		
▪ Budget Narrative	6		
▪ Co-investment Resources*	5		
Sustainability (Questions 16-17)	10		
▪ Plan for possible funding fluctuations	5		
▪ Systemic changes as a result of the partnership with United Way	5		
TOTAL	100		
Maximum score is 100.			
* The greater the percentage of the agency’s investment, the higher the score. (ex: 90% agency investment = 5 points; 50% agency investment = 1 point)			

STRONG INDIVIDUALS AND FAMILIES SCORING RUBRIC - JOINT APPLICATION

Lead Agency: _____
 Partner Agencies: _____
 Program: _____
 Indicator: _____
 Volunteer: _____
 Date: _____

Section	Max Points	Points Scored	Comments
Collaboration's Capacity (Questions 1-7)	22		
▪ Overview of collaboration's vision alignment with program(s)	3		
▪ Collaboration's program alignment with result, indicator(s) and strategy(ies)	5		
▪ Experience measuring impact	3		
▪ Coordination of Lead Agency	2		
▪ Partners' roles and responsibilities	3		
▪ Collaboration value vs. single organization	3		
▪ Value of Impact Council participation	3		
Program Design (Questions 8-14)	31		
▪ Problem the program(s) will address	3		
▪ Population to be served	3		
▪ Purpose of funding	3		
▪ Community Involvement	4		
▪ Initial actions for partners	3		
▪ Indicators of success for new or existing programs	10		
▪ Implementation plan	5		
Performance Measures & Evaluation (Question 15)	20		
▪ Short and long-term impact proposed	10		
▪ Performance Measures and Targets	10		
Budget, Narrative and Co-investment Funds (Questions 16-17)	17		
▪ Partner budgets	3		
▪ Overall Budget	5		
▪ Budget Narrative	4		
▪ Co-investment Resources*	5		
Sustainability (Questions 19-20)	10		
▪ Plan for possible funding fluctuations	5		
▪ Systemic changes as a result of the partnership with United Way	5		
TOTAL	100		
Maximum score is 100.			

* The greater the percentage of the agency's investment, the higher the score. (ex: 90% agency investment = 5 points; 50% agency investment = 1 point)

EQUITY:

As United Way is the steward of this Community Impact work, equity is upheld in the highest standard. United Way believes that equity means a just and fair inclusion into a society in which all can participate, prosper and reach their full potential. As an applicant, we ask the agency to commit to providing services and resources that build on this inclusion and uphold this statement of equity in all facets of this work.

DIVERSITY:

United Way recognizes diversity and inclusion as values that are critical to achieving its mission. To be diverse and inclusive is to bring together unique individual backgrounds to collectively address the issues facing our community.

INTELLECTUAL PROPERTY:

If selected, the applicant agrees to abide by the following regarding intellectual property rights: Applicant shall pay all royalties and licensing fees that may be necessary in the Respondent's performance of services. Applicant shall hold United Way harmless and indemnify United Way from the payment of any royalties, damages, losses or expenses including attorney's fees for suits, claims or otherwise, growing out of infringement or alleged infringement of copyrights, patents, materials and methods used in the project performed by the applicant. It shall defend all suits for infringement of any Intellectual Property rights. Further, if the applicant has reason to believe that the design, process or product utilized in the performance of services under an awarded contract is an infringement of Intellectual Property right, it shall promptly give such information to United Way.

INSURANCE REQUIREMENTS:

Each funded agency must carry the following minimum level of liability insurance coverage required:

General Liability

\$1,000,000 Per Occurrence
\$2,000,000 General Aggregate
\$2,000,000 Products/Completed Operations Aggregate
\$1,000,000 Personal & Advertising Injury

Sexual Abuse & Molestation Liability

\$1,000,000 Per Occurrence/Aggregate

Professional Liability

\$1,000,000 Each Professional Incident
\$2,000,000 Aggregate

- Policy must be 'Primary & Noncontributory'
- Policy must contain an endorsement listing United Way of San Antonio and Bexar County as an 'Additional Insured' using Form CG2010 07 04 or equivalent
- Policy must contain a 'Waiver of Subrogation' endorsement

Automobile Liability

\$1,000,000 Combined Single Limit

- Policy must contain 'Additional Insured' endorsement listing United Way of San Antonio and Bexar County
- Policy must contain a 'Waiver of Subrogation' endorsement

Workers' Compensation & Employer's Liability

\$1,000,000 Each Accident

\$1,000,000 Disease – Policy Limit

\$1,000,000 Disease – Each Employee

- Must provide evidence of Worker's Compensation & Employer's Liability
- Policy must contain a 'Waiver of Subrogation' endorsement

REQUIRED BACKGROUND CHECKS:

All personnel associated with a United Way-funded program are required to undergo a criminal background check prior to beginning work on a United Way funded program and prior to serving clients or viewing client files. The funded agency will conduct background checks via DFPS, DPS and FBI (if applicable) for each employee. Specific requirements related to background checks will be included in final contract for successful proposals.

APPEALS PROCESS:

Grounds for Appeal: The governing Board of any agency may request an appeal of the decisions of the RFP Review Process if there is clear and convincing evidence the Review Team failed to observe the intent of the process as communicated in the RFP.

Procedure:

The governing Board of an agency wishing to appeal the decisions and/or findings of the RFP Review Process must submit its request for an appeal in writing to United Way within 30 days of its official funding notification.

The Chairman of the Board of Trustees will appoint at least three members of the Executive Committee and at least five members from the Partners for Community Change Committee to serve as the Appeals Committee.

The Appeals Committee will review all letters requesting appeals to determine which of these meet, or fail to meet, the required grounds. The Appeals Committee may, as they make this review, consult with the Chair and Co-Chair of the RFP Review Team whose findings are being appealed. The Appeals Committee will report its recommendations to the Executive Committee.

The Executive Committee will consider the report of the Appeals Committee and render its decision concerning the appeal. There is no appeal of the decision of the Executive Committee.

Timing:

The Appeals Process will be concluded within 120 days following the receipt of the request for appeal.

GLOSSARY

Accountability Standards	Core policies that reflect the values that characterize United Way and its partner agencies; designed to assure donors that agencies operating United Way-funded programs are administered efficiently, financially accountable, governed effectively and have diverse sources of funding. All agencies applying for United Way funding
Agency Eligibility Questions	Preliminary questions used to determine if an agency is eligible to respond to the Request for Proposal (RFP).
At or above proficiency	To meet or exceed expectations for the State of Texas standardized testing.
Bidders Conference	In-person meetings that will allow potential applicants to receive information and ask questions about the RFP process.
Chronically Absent	Describes a student who has missed 10% or more school days due to absence for any reason – excused or unexcused absences and suspensions.
Co-investment	Resources the applicant will invest in the program budget. United Way will provide up to 50% of funds needed to operate program. This may include an indirect rate not to exceed 10%. The amount of the co-investment plus the United Way award will equal 100% of the proposed budget.
Collaboration	Formal relationship in which all parties strategically choose to cooperate in order to achieve shared or overlapping objectives. A collaboration combines resources to improve direct services to clients. It may also include administrative functions such as shared human resources, training, information services, equipment, finances, co-location of staff or service or joint efforts to reduce overlap/duplication of services.
Collective Impact	Commitment of a group of actors from different sectors to work towards a common agenda to solve a specific social problem, using a structured form of collaboration. In addition to a common agenda, other key elements include shared measurements, mutually reinforcing activities, continuous communication and a backbone organization.
Culturally Competent	Per the Substance Abuse and Mental Health Services Administration : Ability to interact effectively with people of different cultures. Cultural competence means to be respectful and responsive to the beliefs and practices—and cultural and linguistic needs—of diverse population groups. Developing cultural competence is also an evolving, dynamic process that takes time and occurs along a continuum .
Disconnected Youth	Teen teenagers or young adults between ages of 16 and 24 who are neither working nor in school. Also referred to “disengaged” or “opportunity” youth.
Doing Business As (DBA)	Operating name of a company, as opposed to the legal name of the company.

Due Diligence	Review process conducted by a volunteer review team to determine an agency's financial solvency, independent board oversight, sound administrative practices and program viability. This process will determine which programs will receive an investment and at what level.
e-CImpact	Software that gives applying agencies a web-based interface to submit proposals to United Way while allowing United Way volunteers to review those submissions.
Evidence-based	Proven and informed delivery of treatments and services. Expansion of services to a new target population are not considered evidence-based.
Family Violence	Act by a member of a family or household against another member that is intended to result in physical harm, bodily injury, assault, or a threat that reasonably places the member in fear of imminent physical harm. The law excludes the reasonable discipline of a child and defines abuse as physical injury that results in substantial harm or genuine threat; sexual contact, intercourse, or conduct; or compelling or encouraging the child to engage in sexual conduct. By definition and for the purposes of family violence reports, 'family' includes individuals related by consanguinity (blood) or affinity, marriage or former marriage, biological parents of the same child, foster children, foster parents, and members or former members of the same household (including roommates). Senate Bill 68 of the 77th Legislature amended the Family Code to include "Dating Violence". The "Dating Relationship" means a relationship between individuals who have or have had a continuing relationship of a romantic or intimate nature. (Source: The Texas Family Code)
Independent Application	Application form for a single agency submitting a proposal.
Integrated	A holistic approach to serving clients or addressing challenges using multiple methods of approaches simultaneously based on need in order to ensure lasting change.
Impact Area	Priority area for investing donor dollars. United Way's impact areas are ready children, successful students, strong individuals and families and safety net services.
Impact Council	Group of community leaders, content experts, residents, funders and public sector representatives who come together to work on a common agenda and determine how to invest donor dollars to achieve community-level change. Funded agencies become members of an Impact Council.
Indicator	Population-level measure which helps quantify the achievement of a result.
Indirect Rate	Percentage of expenses not readily identified with a specific project or organizational activity but incurred for the benefit of the funded program. For the purpose of this RFP, an indirect rate of no more than 10% may be calculated based on the subtotal of program expenses being requested of United Way.
Joint Application	Application form for two or more agencies forming a collaboration to submit a proposal.

Memorandum of Understanding (MOU)	Written and signed agreement between all partners in a collaboration.
Multi-generational	Serving or having the ability to serve multiple generations of a family simultaneously.
Pacesetter Campaign	United Way fundraising campaign that runs prior to the full, community-wide campaign to set the tempo and generate enthusiasm, support and leadership.
Preliminary Review	Staff review of proposals to ensure completeness.
Performance Measure	Measure of how well a program, agency or service system is working by answering the questions: How much did we do? How well did we do it? Is anyone better off?
Place-based Approach	Seeks to improve community conditions at the neighborhood or specific geographic level. Place-based approaches engage local organizations, leaders, residents and existing assets in order to create comprehensive positive change in a given neighborhood or geographic area.
Prepared and Engaged Adult	Person over the age of 18 who is equipped with the necessary tools to aid in a young person's future success and is fully vested in achieving that success.
Reengagement Programs	Services that engage disconnected youth in either education and/or workforce on a permanent basis.
Request for Proposal (RFP)	Guidelines and criteria for developing a program's request for investment from United Way.
Result	Condition of well-being for children, adults, families or communities.
Results Based Accountability (RBA)	Disciplined way of thinking and acting to improve entrenched and complex social problems. Communities use it to improve the lives of children, youth, adults and families. RBA uses a data-driven decision-making process to help communities and organizations get beyond talking about problems to taking action to solve problems.
Scaffolded	Approach to social services programming that addresses clients' specific needs and meets them where they are as they progress on their individual journey.
Scoring Rubric	Tool used by the volunteer review team to evaluate various aspects of proposals and determine which programs will be recommended for funding.
Shared Data System	Database that includes all relevant client information that is shared with partner organizations for the purpose of coordination of a continuum of services, referrals between programs and agencies, outcome performance tracking and continuous improvement.

Social and Emotional Learning (SEL)	Process through which young people effectively apply knowledge, attitudes and skills necessary to understand and manage emotions, set and achieve goals, feel and show empathy for others, establish and maintain positive relationships and make responsible decisions.
Speakers Bureau	Agency representatives who share with donors (employee groups) the impact of the work funded by United Way and success stories experienced by clients and their families.
Strategy	Method or plan chosen to bring about a desired result.
Targeted & Demand Occupations	Identified by Workforce Solutions Alamo as occupations which demonstrate strong regional growth potential and which provide the best employment opportunities for local job seekers. A list of those occupations may be found here
Transition Camp	Program designed to acclimate students to the rigor of either the middle school or high school environment. Transitions happen from 5 th to 6 th and 8 th to 9 th grades.
Trauma-informed	Program, organization or system that is trauma-informed: <ul style="list-style-type: none"> a) <i>Realizes</i> the widespread impact of trauma and understands potential paths for recovery; b) <i>Recognizes</i> the signs and symptoms of trauma in clients, families, staff, and others involved with the system; c) <i>Responds</i> by fully integrating knowledge about trauma into policies, procedures, and practices; and d) Seeks to actively resist <i>re-traumatization</i>. (Source: Substance Abuse and Mental Health Services Administration)
United Way Contract Request (line item in program budget)	Amount of United Way funding requested for this RFP.
United Way Grant (line item in program budget)	Funding agency currently receives for a United Way grant-funded program such Dual Gen, EFSP, HOPES, MIECHV or Military (MVFP) that is associated with this request.
Volunteer Review Team	Impact Council volunteers who review proposals and develop funding recommendations.
Vulnerable Youth	Young people at risk of becoming disconnected from school or work, chronically absent or have disciplinary/behavioral issues.

Wraparound Services

Individualized, multi-faceted, person-centered care that meets the holistic Case Management needs of clients in a manner that is based on developing a strong relationship between the case manager and the client. Priority will be given to applicants who address multiple components outlined below well:

- a) Culturally competent support services which aid clients in achieving self-sufficiency, including soft skills development
- b) Mental health, behavioral health and substance abuse services
- c) High-quality dependent care support (dependents include children, special needs family members and/or seniors)
- d) Transportation assistance
- e) Financial counseling and access to tax credits
- f) Utility, clothing, food and housing assistance (basic needs support)
- g) Public benefits coordination
- h) Parenting education
- i) Health and wellness (both preventative and treatment-based)
- j) Employment and education-related scholarships for needed supplies and fees
- k) Additional supports as defined by applicant agencies

Strong Individuals and Families Impact Council Result/Indicator/Strategy Table

Strong Individuals and Families Impact Council Summary of Result, Indicators and Strategies

All individuals and families are stable, flourish economically, reach their full potential and maintain a quality of life free of discrimination.

<p>Indicator 1: % of population at or below 200% of FPL</p>	<p>Summary of Strategy: 1a: Provide and/or build capacity for organizations that offer education and workforce development (e.g. adult basic education and/or non-degree certificates, industry-specific certificates or other career pathways) to clients at or below 200% of FPL.</p>
<p>Indicator 2: % of population between 200-300% of FPL</p>	<p>Summary of Strategies: 2a: Provide and/or build capacity for organizations that offer education and workforce development (e.g. adult basic education and/or non-degree certificates, industry-specific certificates or other career pathways) to clients between 200-300% of FPL. 2b: Support collective impact initiatives that convene community partners and stakeholders and which result in system-level changes that advance people beyond 300% of FPL.</p>
<p>Indicator 3: Wage disparity ratio between full-time women of color earners and white male full-time earners</p>	<p>Summary of Strategies: 3a: Build an awareness campaign that communicates wage and opportunity disparities between women of color earners and Anglo male earners, focused on the broader economic impact this disparity has on Bexar County overall. 3b: Provide and/or build capacity for organizations that offer education and workforce development (e.g. adult basic education and/or non-degree certificates, industry-specific certificates or other career pathways) to women of color.</p>
<p>Indicator 4: # of family violence incident reports reported per 100,000 population</p>	<p>Summary of Strategy: 4a: Expand prevention and/or intervention services that interrupt the cycle of family violence¹⁰ for individuals and families who are either at risk of family violence or who are already victims or perpetrators themselves. Services should seek to increase connection of isolated and vulnerable populations with the community and may include efforts that help people stay safe, stay healthy, and/or stay in their homes</p>

Appendix A

INDICATOR 1

Strong Individuals and Families Impact Council Result: All individuals and families are stable, flourish economically, reach their full potential and maintain a quality of life free of discrimination.

Overview of Intent of Result: Through this RFP, United Way's Strong Individuals and Families Impact Council seeks applicants providing services that increase income, reduce wage disparities and interrupt the cycle of family violence. This RFP is for the entire result, and applicants may apply to one or more indicator(s) and one or more of the corresponding strategy(ies) via one proposal, so long as each indicator selected and each strategy selected is addressed thoroughly. It is expected that if an applicant applies for more than one indicator in a proposal, the applicant will explain how the work to achieve the indicators' targets is intentionally integrated in the proposed program(s). Applicants may also choose to apply to a single indicator only. Successful proposals will demonstrate how program initiatives will provide services to adults and, in cases where dependent care is addressed, their dependents. Successful proposals may be evidence-based, promising practices and/or opportunities for innovation. Please note that strategies 1a, 2a and 3b all seek to improve the economic standing of individuals and families by increasing income through employment or employment at a better wage with person-centered, wraparound case management as a crucial key to barrier removal for clients. While component categories of the aforementioned strategies are the same, how applicants approach the implementation of each should be both innovative and different given the different needs of the target populations. It should be also noted that some strategies are person-level while others are systems-level approaches to impacting the indicator.

Indicator 1: Percentage of population at or below 200% of the Federal Poverty Level (FPL)

Data Resources: Available at <https://www.unitedwaysatx.org/impact-council-data/>

Target: The percentage of population at or below 200% of FPL will decrease by 5%.

Projected timeframe for impact: 5 years

Indicator	All full-time earners in Bexar County (2016)	Current Rate (2016)	5% Change
% of population under 200% of FPL	659,879	392,915 working age people (18-64 years) at or below 200% of FPL	19,645

Available funding for the entire RESULT: Up to \$5,000,000 annually for a 5-year contract (pending performance, with an annual contract review and/or opportunity to renegotiate the contract). United Way will provide up to 50% of funds needed to operate the program. Exceptions will be considered for innovative or start-up programs. Applicants may submit one proposal addressing one or more of the indicator(s) and one or more of the corresponding strategy(ies) via one proposal. Applicants submitting proposals for a program(s) that address more than one indicator should only do so if the program or set of programs are truly addressing each indicator selected and each strategy selected in an *integrated* manner. If multiple

programs are submitted under one proposal, they must be *integrated* and described thoroughly. It is unlikely that one indicator will be funded at the full \$5,000,000.

Strategy 1a: Provide and/or build capacity for organizations that offer education and workforce development (e.g. adult basic education and/or non-degree certificates, industry-specific certificates or other career pathways) to clients at or below 200% of FPL.

Required Standards of Provision of Services for Strategy 1a: Education and workforce development must occur in concert with person-centered, wraparound case management¹, both of which should focus on increasing wages and/or obtaining and maintaining employment for people at or below 200% of the Federal Poverty Level in [targeted and demand occupations](#)², including STEAM occupations. Wraparound case management should be offered via a single point of entry to remove barriers and minimize the duplication of services in order to meet the holistic needs of participants. Services should be ‘scaffolded’³, ‘multi-generational’⁴, integrated⁵, trauma-informed⁶ and culturally competent⁷ in nature. *(Components of person-centered, wraparound case management are included in the definition and priority will be given to applicants who address multiple components well.)*

Service Area for Strategy 1a: Bexar County with priority given to place-based⁸ approaches in applicant-selected zip codes or target areas based on data indicating need.

Strategy 1a Performance Measures:

<p>How much? Number of people under 200% of FPL recruited for program Number of people under 200% of FPL enrolled in program as participating client Number of direct service practitioners participating in capacity building on adult education and workforce development for clients below 200% of FPL</p>	<p>How well? Percentage of recruited people who were enrolled in program as participating clients Number of participating clients meeting program dosage requirements (as defined by program model) Percentage of participating clients meeting program dosage requirements (as defined by program model) Number of participating clients completing program Percentage of participating clients completing program</p>
<p>How better off? Number of participating clients with increased educational attainment at the time of program completion Percentage of participating clients with increased educational attainment at the time of program completion Number of participating clients employed at the time of program completion Percentage of participating clients employed at the time of program completion Number of participating clients with income increase at the time of program completion Percentage of participating clients with income increase at the time of program completion Number of participating clients with income above 200% of FPL at the time of program completion Percentage of participating clients with income above 200% of FPL at the time of program completion Number of participating clients employed 6 months after program completion Percentage of participating clients employed 6 months after program completion Number of participating clients employed 9 months after program completion Percentage of participating clients employed 9 months after program completion</p>	

Number of participating clients employed 12 months after program completion Percentage of participating clients employed 12 months after program completion Number of participating clients with income above 200% of FPL 6 months after program completion Percentage of participating clients with income above 200% of FPL 6 months after program completion Number of participating clients with income above 200% of FPL 9 months after program completion Percentage of participating clients with income above 200% of FPL 9 months after program completion Number of participating clients with income above 200% of FPL 12 months after program completion Percentage of participating clients with income above 200% of FPL 12 months after program completion	
How much? (<i>Strategy 1a capacity building only</i>) Number of direct service practitioners participating in capacity building on adult education and workforce development for clients below 200% of FPL	How well? (<i>Strategy 1a capacity building only</i>) Percentage of participating direct service practitioners completing capacity building on adult education and workforce development for clients below 200% of FPL
How better off? (<i>Strategy 1a capacity building only</i>) Number of participating direct service practitioners demonstrating increased skills on adult education and workforce development for clients below 200% of FPL Percentage of participating direct service practitioners demonstrating increased skills on adult education and workforce development for clients below 200% of FPL	

INDICATOR 2

Strong Individuals and Families Impact Council Result: All individuals and families are stable, flourish economically, reach their full potential and maintain a quality of life free of discrimination.

Indicator 2: Percentage of population between 200-300% of the Federal Poverty Level (FPL)

Data Resources: Available at <https://www.unitedwaysatx.org/impact-council-data/>

Target: The percentage of population between 200-300% of FPL will decrease by 5% by moving them beyond 300% of FPL.

Projected timeframe for impact: 5 years

Indicator	All full-time earners in Bexar County (2016)	Current Rate (2016)	5% Change
Percentage of population between 200-300% of FPL	659,879	221,407 working age people (18-64 years) at or below 200% of FPL	11,070

Available funding for the entire RESULT: Up to \$5,000,000 annually for a 5-year contract (pending performance, with an annual contract review and/or opportunity to renegotiate the contract). United Way will provide up to 50% of funds needed to operate the program. Exceptions will be considered for innovative or start-up programs. Applicants may submit one proposal addressing one or more of the indicators and one or more of the corresponding strategies via one proposal. Applicants submitting proposals for programs that address more than one indicator should only do so if the program or set of programs are truly addressing each indicator selected and each strategy selected in an *integrated* manner. If multiple programs are submitted under one proposal, they must be *integrated* and described thoroughly. *It is unlikely that one indicator will be funded at the full \$5,000,000.*

Strategy 2a: Provide and/or build capacity for organizations that offer education and workforce development (e.g. adult basic education and/or non-degree certificates, industry-specific certificates or other career pathways) to clients between 200-300% of FPL.

Required Standards of Provision of Services for Strategy 2a: Education and workforce development must occur in concert with person-centered, wraparound case management¹, both of which should focus on increasing wages and/or obtaining and maintaining employment for people between 200-300% of FPL in [targeted and demand occupations](#)², including STEAM occupations. Wraparound case management should be offered via a single point of entry to remove barriers and minimize the duplication of services in order to meet the holistic needs of participants. Services should be ‘scaffolded³,’ multi-generational⁴, integrated⁵, trauma-informed⁶ and culturally competent⁷ in nature. *(Components of person-centered, wraparound case management are included in the definition and priority will be given to applicants who address multiple components well.)*

Service Area for Strategy 2a: Bexar County with priority given to place-based⁸ approaches in applicant-selected zip codes or target areas based on data indicating need.

Strategy 2a Performance Measures

<p>How much? Number of people between 200-300% of FPL recruited for program Number of people between 200-300% of FPL enrolled in program as participating clients</p>	<p>How well? Percentage of recruited people between 200-300% of FPL who were enrolled in program as participating clients Number of participating clients meeting program dosage requirements (as defined by program model) Percentage of participating clients meeting program dosage requirements (as defined by program model) Number of participating clients completing program Percentage of participating clients completing program</p>
<p>How better off? Number of participating clients with increased educational attainment at the time of program completion Percentage of participating clients with increased educational attainment at the time of program completion Number of participating clients employed at the time of program completion Percentage of participating clients employed at the time of program completion Number of participating clients with income increase at the time of program completion Percentage of participating clients with income increase at the time of program completion Number of participating clients with income above 300% of FPL at the time of program completion Percentage of participating clients with income above 300% of FPL at the time of program</p>	

completion Number of participating clients employed 6 months after program completion Percentage of participating clients employed 6 months after program completion Number of participating clients employed 9 months after program completion Percentage of participating clients employed 9 months after program completion # of participating clients employed 12 months after program completion Percentage of participating clients employed 12 months after program completion # of participating clients with income above 300% of FPL 6 months after program completion Percentage of participating clients with income above 300% of FPL 6 months after program completion # of participating clients with income above 300% of FPL 9 months after program completion Percentage of participating clients with income above 300% of FPL 9 months after program completion # of participating clients with income above 300% of FPL 12 months after program completion Percentage of participating clients with income above 300% of FPL 12 months after program completion	
How much? (<i>Strategy 2a capacity building only</i>) Number of direct service practitioners participating in capacity building on adult education and workforce development for clients between 200-300% of FPL	How well? (<i>Strategy 2a capacity building only</i>) Percentage of participating direct service practitioners completing capacity building on adult education and workforce development for clients between 200-300% of FPL
How better off? (<i>Strategy 2a capacity building only</i>) Number of participating direct service practitioners demonstrating increased skills on adult education and workforce development for clients between 200-300% of FPL Percentage of participating direct service practitioners demonstrating increased skills on adult education and workforce development for clients between 200-300% of FPL	

Strategy 2b: Support collective impact⁹ initiatives that convene community partners and stakeholders and which result in system-level changes that advance people beyond 300% of FPL.

Service Area for Strategy 2b: Bexar County

Strategy 2b Performance Measures:

How much? Number of system-level changes to raise household incomes above 300% of FPL identified Number of system-level changes to raise household incomes above 300% of FPL pursued Percentage of identified system-level changes to raise household incomes above 300% of FPL pursued	How Well? <i>No required 'how well' performance measures.</i>
How better off? Number of system-level changes to raise household incomes above 300% of FPL achieved Percentage of pursued system-level changes to raise household incomes above 300% of FPL achieved	

Number of system-level changes to raise household incomes above 300% of FPL sustained
 Percentage of pursued system-level changes to raise household incomes above 300% of FPL sustained

INDICATOR 3

Strong Individuals and Families Impact Council Result: All individuals and families are stable, flourish economically, reach their full potential and maintain a quality of life free of discrimination.

Indicator 3: Wage disparity ratio between full-time women of color earners and full-time Anglo male earners

Data Resources: Available at <https://www.unitedwaysatx.org/impact-council-data/>

Target: The wage disparity ratio between women of color full-time earners and Anglo male full-time earners will decrease by 5%.

Projected timeframe for impact: 5 years

Indicator	Current Rate (2016)	5% Change
Wage disparity ratio between women of color full-time earners and Anglo male full-time earners	1:1.86	0.093

Available funding for the entire RESULT: Up to \$5,000,000 annually for a 5-year contract (pending performance, with an annual contract review and/or opportunity to renegotiate the contract). United Way will provide up to 50% of funds needed to operate the program. Exceptions will be considered for innovative or start-up programs. Applicants may submit one proposal addressing one or more of the indicators and one or more of the corresponding strategies via one proposal. Applicants submitting proposals for programs that address more than one indicator should only do so if the program or set of programs are truly addressing each indicator selected and each strategy selected in an *integrated* manner. If multiple programs are submitted under one proposal, they must be *integrated* and described thoroughly. *It is unlikely that one indicator will be funded at the full \$5,000,000.*

Strategy 3a: Build an awareness campaign that communicates wage and opportunity disparities between women of color earners and Anglo male earners, focused on the broader economic impact this disparity has on Bexar County overall.

Required Standards of Provision of Services for Strategy 3a: The campaign should focus on why diversity and inclusion, as well as the hiring practices of employers, matter to all residents of Bexar County. The campaign should also create awareness about the federal, state and local incentives for investing in women of color, as well as provide information on the availability of trainings regarding the importance of promoting and paying equal wages for equal work for women of color.

Service area for Strategy 3a: Bexar County

Strategy 3a Performance Measures:

<p>How much? Number of system-level changes to reduce wage and opportunity disparities between women of color earners and Anglo male earners identified Number of system-level changes to reduce wage and opportunity disparities between women of color earners and Anglo male earners pursued Percentage of identified system-level changes to reduce wage and opportunity disparities between women of color earners and Anglo male earners pursued</p>	<p>How well? <i>No required 'How well' Performance Measures</i></p>
<p>How better off? Number of system-level changes to reduce wage and opportunity disparities between women of color earners and Anglo male earners achieved Percentage of pursued system-level changes to reduce wage and opportunity disparities between women of color earners and Anglo male earners achieved Number of system-level changes to reduce wage and opportunity disparities between women of color earners and Anglo male earners sustained Percentage of pursued system-level changes to reduce wage and opportunity disparities between women of color earners and Anglo male earners sustained</p>	

Strategy 3b: Provide and/or build capacity for organizations that offer education and workforce development (e.g. adult basic education and/or non-degree certificates, industry-specific certificates or other career pathways) to women of color.

Required Standards of Provision of Services for Strategy 3b: Education and workforce development must occur in concert with person-centered, wraparound case management¹, both of which should focus on increasing wages and/or obtaining and maintaining employment for women of color in [targeted and demand occupations](#)², including STEAM occupations. Wraparound case management should be offered via a single point of entry to remove barriers and minimize the duplication of services in order to meet the holistic needs of participants. Services should be 'scaffolded³,'multi-generational⁴, integrated⁵, trauma-informed⁶ and culturally competent⁷ in nature. *(Components of person-centered, wraparound case management are included in the definition and priority will be given to applicants who address multiple components well.)*

Service Area for Strategy 3b: Bexar County with priority given to place-based⁸ approaches in applicant-selected zip codes or target areas based on data indicating need.

Performance Measures for Strategy 3b:

<p>How much? Number of women of color recruited for program Number of women of color enrolled in program as participating clients</p>	<p>How well? Percentage of recruited women of color enrolled in program as participating clients Number of participating clients meeting program dosage requirements (as defined by program model) Percentage of participating clients meeting program</p>
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	dosage requirements (as defined by program model) Number of participating clients completing program Percentage of participating clients completing program
How better off?	
Number of participating clients with increased educational attainment at the time of program completion	
Percentage of participating clients with increased educational attainment at the time of program completion	
Number of participating clients employed at the time of program completion	
Percentage of participating clients employed at the time of program completion	
Number of participating clients with income increase at the time of program completion	
Percentage of participating clients with income increase at the time of program completion	
Number of participating clients with income above the median income for women of color at the time of program completion	
Percentage of participating clients with income above the median income for women of color at the time of program completion	
Number of participating clients with employment 6 months after program completion	
Percentage of participating clients with employment 6 months after program completion	
Number of participating clients with employment 9 months after program completion	
Percentage of participating clients with employment 9 months after program completion	
Number of participating clients with employment 12 months after program completion	
Percentage of participating clients with employment 12 months after program completion	
Number of participating clients with income above the median income for women of color 6 months after program completion	
Percentage of participating clients with income above the median income for women of color 6 months after program completion	
Number of participating clients with income above the median income for women of color 9 months after program completion	
Percentage of participating clients with income above the median income for women of color 9 months after program completion	
Number of participating clients with income above the median income for women of color 12 months after program completion	
Percentage of participating clients with income above the median income for women of color 12 months after program completion	
How much? (<i>Strategy 3b capacity building only</i>)	How well? (<i>Strategy 3b capacity building only</i>)
Number of direct service practitioners participating in capacity building on adult education and workforce development for women of color	Percentage of participating direct service practitioners completing capacity building on adult education and workforce development for women of color
How better off? (<i>Strategy 3b capacity building only</i>)	
Number of participating direct service practitioners demonstrating increased skills on adult education and workforce development for women of color	
Percentage of participating direct service practitioners demonstrating increased skills on adult education and workforce development for women of color	

INDICATOR 4

Strong Individuals and Families Impact Council Result: All individuals and families are stable, flourish economically, reach their full potential and maintain a quality of life free of discrimination.

Indicator 4: Number of family violence incident reports reported per 100,000 population

Data Resources: Available at <https://www.unitedwaysatx.org/impact-council-data/>

Target: The number of reports of family violence will decrease by 5%.

Projected timeframe for impact: 5 years

Indicator	Rate per 100,000 population (2016)	Current Number (2016)	5% Change
Number of family violence indecent reports per 100,000 population	578.2	11,151	557

Available funding for the entire RESULT: Up to \$5,000,000 annually for a 5-year contract (pending performance, with an annual contract review and/or opportunity to renegotiate the contract). United Way will provide up to 50% of funds needed to operate the program. Exceptions will be considered for innovative or start-up programs. Applicants may submit one proposal addressing one or more of the indicators and one or more of the corresponding strategies via one proposal. Applicants submitting proposals for programs that address more than one indicator should only do so if the program or set of programs are truly addressing each indicator selected and each strategy selected in an *integrated* manner. If multiple programs are submitted under one proposal, they must be *integrated* and described thoroughly. *It is unlikely that one indicator will be funded at the full \$5,000,000.*

Strategy 4a: Expand prevention and/or intervention services that interrupt the cycle of family violence¹⁰ for individuals and families who are either at risk of family violence or who are already victims or perpetrators themselves. Services should seek to increase connection of isolated and vulnerable populations with the community and may include efforts that help people stay safe, stay healthy, and/or stay in their homes, including but not limited to:

- i. Emergency shelter and crisis intervention for victims of family violence
- ii. In-home support services
- iii. Mental, behavioral health and substance abuse services
- iv. Respite care
- v. Senior and special needs family members support services
- vi. Court-referred client services
- vii. Education and workforce development
- viii. Additional supports as defined by applicant agencies

Required Standards of Provision of Services for Strategy 4a: Services should be 'scaffolded³, multi-generational⁴, integrated⁵, trauma-informed⁶ and culturally competent⁷ in nature.

Service Area for Strategy 4a: Bexar County with priority given to place-based⁸ approaches in applicant-selected zip codes or target areas based on data indicating need.

Strategy 4a Performance Measures:

<p>How much? Number of people recruited for program Number of people enrolled into program who are either at risk of becoming victims of family violence and/or have been victimized Percentage of total people enrolled into program who are either at risk of becoming victims of family violence and/or have been victimized Number of people enrolled into program who are either at risk of becoming perpetrators of family violence and/or already have been identified as perpetrators Percentage of total people enrolled into program who are either at risk of becoming perpetrators of family violence and/or already have been identified as perpetrators Number total of people enrolled into program as participating clients</p>	<p>How well? Percentage of recruited people enrolled into program as participating clients Number of participating clients meeting program dosage requirements (as defined by program model) Percentage of participating clients meeting program dosage requirements (as defined by program model) Number of participating clients completing program Percentage of participating clients completing program</p>
<p>How better off? Number of participating clients with reduced risk of becoming victims of family violence and/or being re-victimized at the time of program completion Percentage of participating clients with reduced risk of becoming victims of family violence and/or being re-victimized at the time of program completion Number of participating clients with reduced risk of becoming perpetrators of family violence and/or re-offend at the time of program completion Percentage of participating clients with reduced risk of becoming perpetrators of family violence and/or re-offend at the time of program completion Number of participating clients who are free of new occurrences of family violence at the time of program completion Percentage of participating clients who are free of new occurrences of family violence at the time of program completion Number of participating clients remaining free of new occurrences of family violence after program completion (tracking duration as per program model) Percentage of participating clients remaining free of new occurrences of family violence after program completion (tracking duration as per program model)</p>	

Definitions of Terms

¹Wraparound case management: Individualized, multi-faceted, person-centered care that meets the holistic needs of clients in a manner that is based on developing a strong relationship between the case manager and the client. Priority will be given to applicants who address multiple components outlined below well:

- i. Culturally competent support services which aid clients in achieving self-sufficiency, including soft skills development
- ii. Mental health, behavioral health and substance abuse services
- iii. High-quality dependent care support (dependents include children, special needs family members and/or seniors)
- iv. Transportation assistance
- v. Financial counseling and access to tax credits
- vi. Utility, clothing, food and housing assistance (basic needs support)
- vii. Public benefits coordination
- viii. Parenting education
- ix. Health and wellness (both preventative and treatment-based)
- x. Employment and education-related scholarships for needed supplies and fees
- xi. Additional supports as defined by applicant agencies

²Targeted and demand occupations: Targeted and demand occupations are those identified by Workforce Solutions Alamo as occupations which demonstrate strong regional growth potential and which provide the best employment opportunities for local job seekers. A list of those occupations may be found [here](#).

³Scaffolded: An approach to programming that meets people where they are on their journey towards self-sufficiency. (Please see visual below.)

⁴Multi-generational: Serving or having the ability to serve multiple generations of a family simultaneously.

⁵Integrated: A holistic approach to serving clients or addressing challenges using multiple methods of approaches simultaneously based on need in order to ensure lasting change.

⁶Trauma-informed: Per the [Substance Abuse and Mental Health Services Administration](#): “A program, organization, or system that is trauma-informed:

1. *Realizes* the widespread impact of trauma and understands potential paths for recovery;
2. *Recognizes* the signs and symptoms of trauma in clients, families, staff, and others involved with the system;
3. *Responds* by fully integrating knowledge about trauma into policies, procedures, and practices; and
4. Seeks to actively resist *re-traumatization*.”

⁷Culturally competent: Per the [Substance Abuse and Mental Health Services Administration](#): “Cultural competence is the ability to interact effectively with people of different cultures. Cultural competence means to [be respectful and responsive](#) to the beliefs and practices—and cultural and linguistic needs—of diverse population groups. Developing cultural competence is also an evolving, dynamic process that takes time and [occurs along a continuum](#).”

⁸**Place-based approach:** An approach that seeks to improve community conditions at the neighborhood or specific geographic level. Place-based approaches engage local organizations, leaders, residents and existing assets in order to create comprehensive positive change in a given neighborhood or geographic area.

⁹**Collective Impact:** Commitment of a group of actors from different sectors to work towards a common agenda to solve a specific social problem, using a structured form of collaboration. In addition to a common agenda, other key elements include shared measurements, mutually reinforcing activities, continuous communication and a backbone organization.

¹⁰**Family violence:** The Texas Family Code defines Family Violence as an act by a member of a family or household against another member that is intended to result in physical harm, bodily injury, assault, or a threat that reasonably places the member in fear of imminent physical harm. The law excludes the reasonable discipline of a child and defines abuse as physical injury that results in substantial harm or genuine threat; sexual contact, intercourse, or conduct; or compelling or encouraging the child to engage in sexual conduct. By definition and for the purposes of family violence reports, ‘family’ includes individuals related by consanguinity (blood) or affinity, marriage or former marriage, biological parents of the same child, foster children, foster parents, and members or former members of the same household (including roommates). Senate Bill 68 of the 77th Legislature amended the Family Code to include “Dating Violence”. The “Dating Relationship” means a relationship between individuals who have or have had a continuing relationship of a romantic or intimate nature.

Visual of ‘Scaffolded’ Approach:

