



Successful Students Impact Council & Strong Individuals and Families Impact Council Bidders Conference

United Way of San Antonio & Bexar County
October 2018

Agenda

- Strategic Alignment & Impact Council Plan
- Results Based Accountability
- Request for Proposal Website
- Independent vs. Joint Applications
- Successful Students Impact Council RFP
- Strong Individuals and Families Impact Council RFP
- Performance Measures
- Checklists
- e-CImpact
- Questions & Answers

United Way Strategic Alignment

New Investment Model:

- Funding opportunities are time limited vs. no limit
- Funding agreement between United Way and future partners is defined in a contract, inclusive of performance targets
- Results-Based Accountability framework allows new levels of data sharing and reporting on a monthly basis (vs. year-end reports)
- All funded partners will become members of the Impact Council and are required to attend monthly meetings
- Mutual and shared accountability to address problems collectively
- United Way will invest a maximum of 50% funding for a program
- United Way will allow for indirect costs now (a maximum of 10%) in addition to direct costs

Results Based Accountability

- Data-driven, decision-making process created by Mark Friedman
- Simple, common-sense framework used globally
- Beginning with the end in mind
 - Results, Indicators, Strategies
- Population vs. Performance Distinction
- Performance Measures:
 - How much did we do?
 - How well did we do it?
 - Is anyone better off?

Impact Council Funding

- Estimated investment of \$5 million per Impact Council for FY2020
- Final amount of FY2020 investment and all future investments will be based on annual United Way Campaign results
- Impact Councils funding will be allocated monthly and will now require monthly program reporting and quarterly financial reporting

Request for Proposal Website

UNITED WAY REQUESTS FOR PROPOSALS

UNITED WAY OF SAN ANTONIO AND BEXAR COUNTY > UNITED WAY REQUESTS FOR PROPOSALS

Below is a current list of United Way of San Antonio and Bexar County Requests for Proposals (RFPs). We may also make Requests for Bids, Requests for Expressions of Interest, and Requests for Qualifications available on this page.

SUCCESSFUL STUDENTS IMPACT COUNCIL (SSIC)

Request for Proposal – Expected release on October 1, 2018, 2:00 p.m. CDT

Updated 10.01.18 – 3:50 p.m.

United Way's Successful Students Impact Council seeks programs and/or initiatives that ensure all young people are actively engaged in their communities, prepared for the 21st Century workforce and have resource-rich environments with prepared and engaged adults to support them in reaching their full potential.

Successful Students Impact Council RFP RESOURCES AND INFORMATION ▾

Successful Students Impact Council RFP TRAINING MATERIALS ▾

? Frequently Asked Questions

STRONG INDIVIDUALS AND FAMILIES IMPACT COUNCIL (SIFIC)

Request for Proposal – Expected release on October 1, 2018, 2:00 p.m. CDT

Updated 10.01.18 – 3:50 p.m.

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.

Strong Individuals and Families Impact Council RFP RESOURCES AND INFORMATION ▾

Strong Individuals and Families Impact Council RFP TRAINING MATERIALS ▾

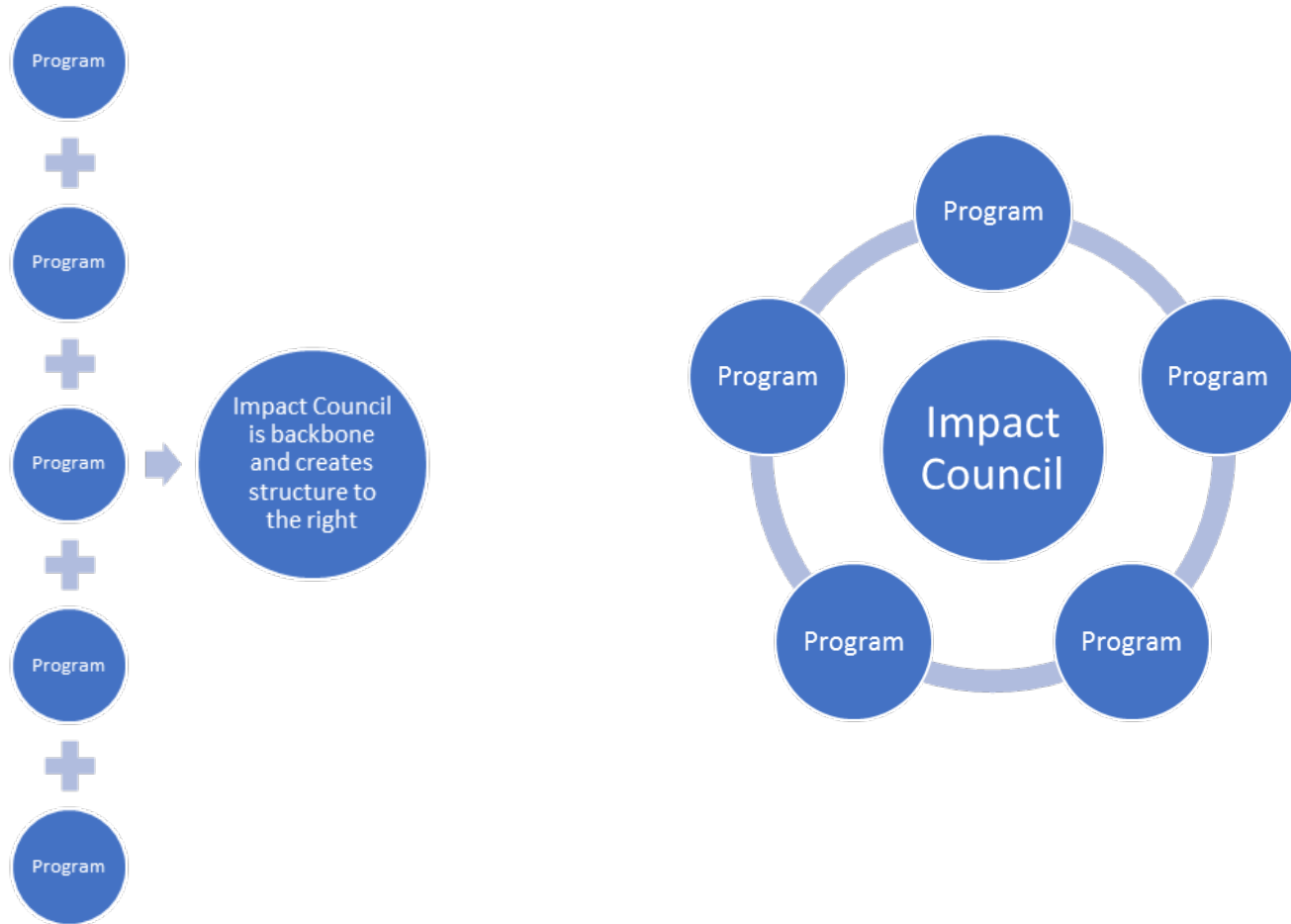
? Frequently Asked Questions

Independent vs. Joint Application

Characteristics of an Independent Application

- Independent Application means only one organization is formally submitting.
- Organization has a successful history of implementing the proposed program or a similar one.
- Ability to co-invest in this program.
- Will this program be most successful with a single agency implementing the program?
- Does key leadership support this program?

Independent Applications



Independent vs. Joint Application

Characteristics of a Joint Application:

- Joint means that either an existing or new partnership with other agencies working towards the same goal are formally submitting together
- Clear lead applicant that can formally represent the collaborative in this joint application
- Strong understanding of the collective impact model and the backbone/lead applicant role
- Rely on other partners to co-invest in this program
- Does the proposed program have more value-add by including other partners? (*i.e.*, wider array of services, outreach opportunities, etc.)

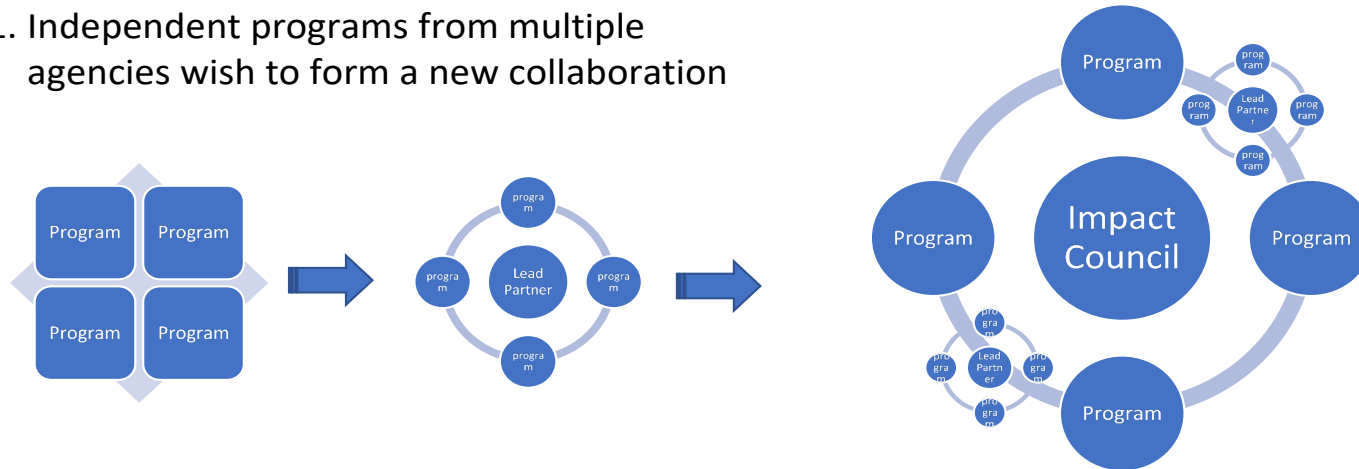
Independent vs. Joint Application

Joint Application (cont.)

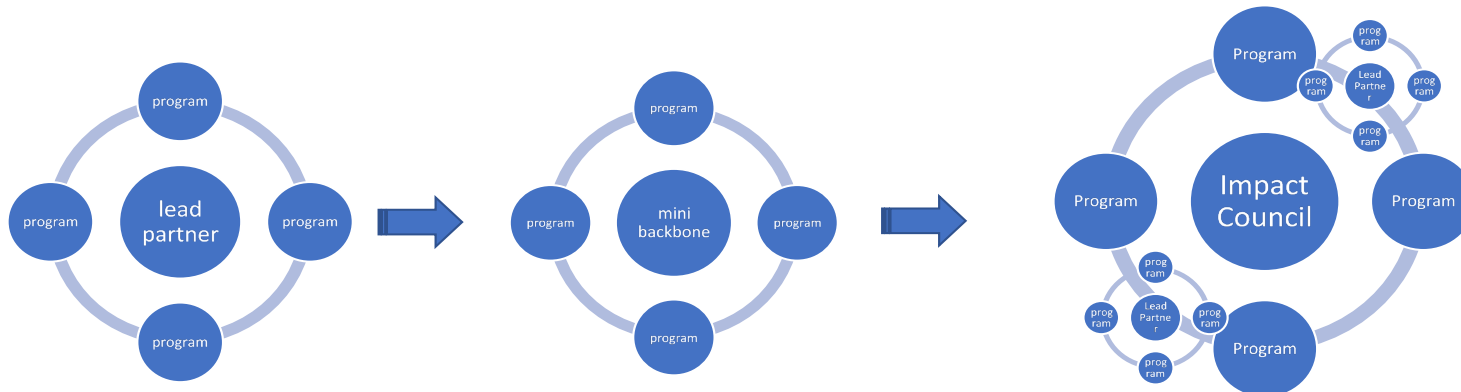
- Two or more agencies share responsibility for delivering performance targets.
- Preference will be given to collaborations that:
 - Are better positioned to achieve performance targets
 - Effectively address the needs of the target population
 - Leverage greater resources than if operated by a single applicant
- Identify a lead agency responsible for managing the collaboration
 - Untied Way will still allocate directly to all funded-partners
- Must include a formal Memorandum of Understanding
- **FUNDING IS NOT GUARANTEED FOR ALL PARTNERS**

Joint Applications

1. Independent programs from multiple agencies wish to form a new collaboration

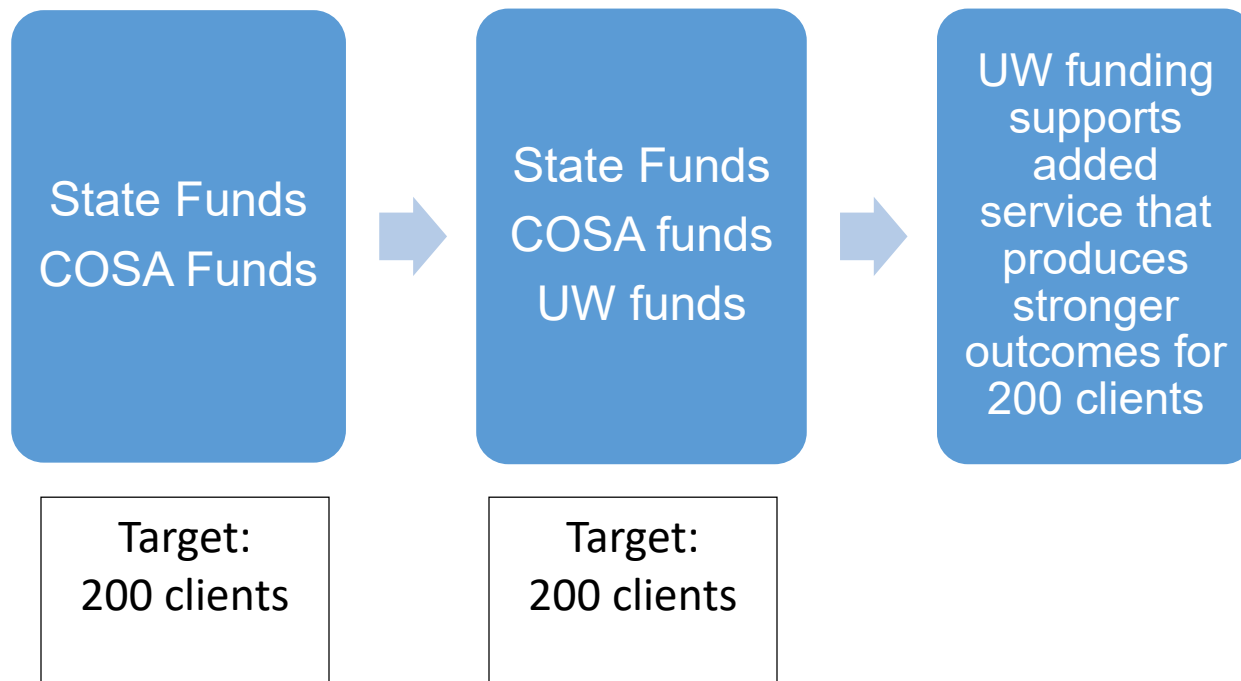


2. An existing collaboration, largely formed on a volunteer basis, wishes to formalize its structure with a paid backbone, shared data systems, etc.



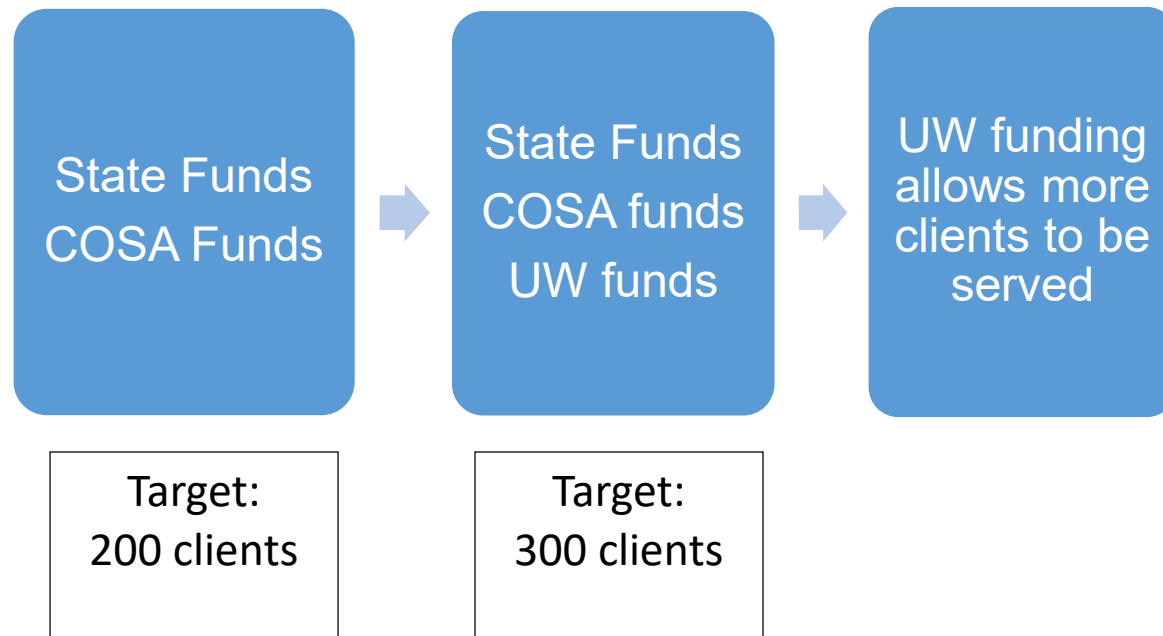
How to Leverage UW Funds

- Scenario 1 – Value Add



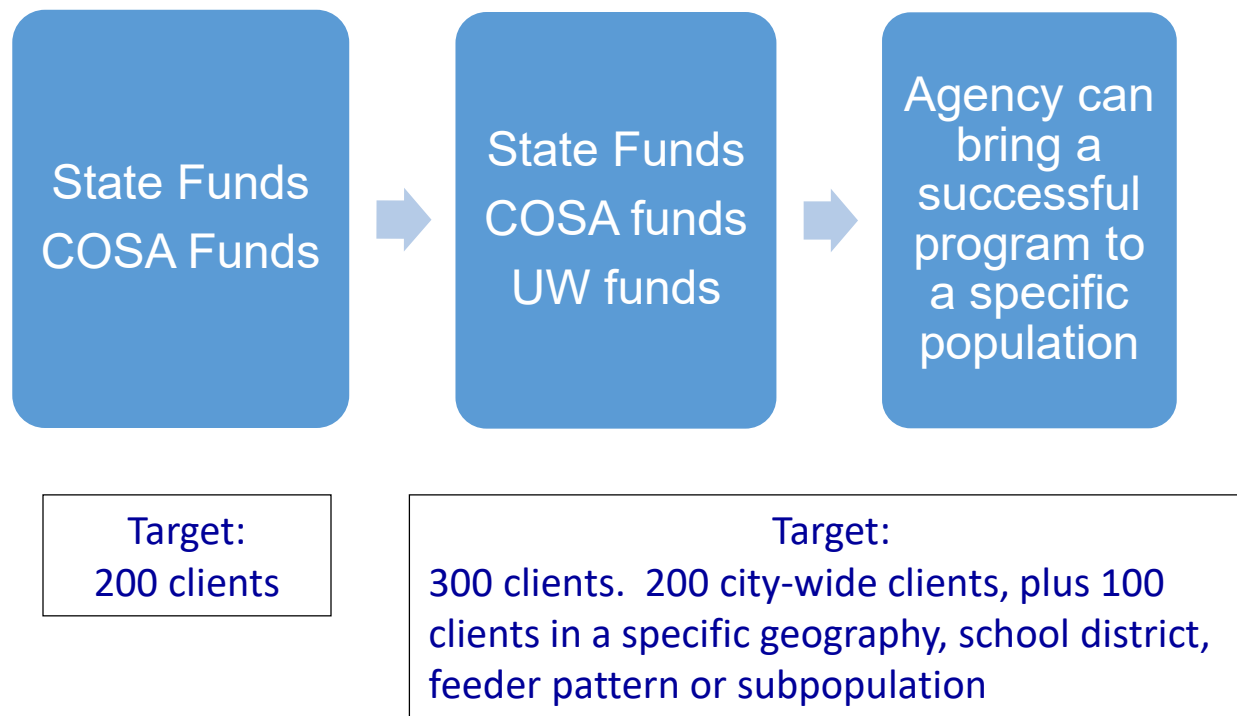
How to Leverage UW Funds

- Scenario 2 - More Served



How to Leverage UW Funds

- Scenario 3 - Focus on Specific Population or Geography



Successful Students and Strong Individual & Families Impact Councils Timeline

Request for Proposals:

Date	Event
October 1, 2018	Release RFPs for Successful Students and Strong Individuals & Families Impact Councils
October 3 – 5, 2018	Bidders Conference Sessions
October 9 – 10, 2018	Technical Assistance Sessions
October 11 – 12, 2018	Performance Measure Assistance Sessions
October 3 – November 4, 2018	Question and Answer Period
November 4, 2018	Blackout Period – no questions accepted after 5:00 p.m. CST
November 15, 2018	RFP Deadline – must be submitted by 12:00 p.m. CST

Successful Students and Strong Individual & Families Impact Councils Timeline

Review:

Date	Event
December 2018 – February 2019	Proposals reviewed by Successful Students and Strong Individual & Families Impact Councils Volunteer Review Teams
March – April 2019	United Way PCCC, Executive Committee and Board Approval

Funding Notification:

April 2019	Applicants notified regarding outcome of Successful Students and Strong Individuals & Families Impact Councils RFP process and soft contract negotiations begin
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Funding Notification:

May 2019	Selected applicants notified of funding amount; Contract negotiations continue and/or are finalized
July 1, 2019	Grant start date; Funded agencies join Impact Councils

Review of RFP for Successful Students Impact Council

Successful Students Impact Council Scope of Work

Results, Indicators and Strategies

Result 1. All young people are actively engaged in their communities and prepared for the 21st Century workforce

Indicator 1.1: #/% of young people at or above proficiency for 3rd grade reading

Strategy:

1. Increase the number of diverse and evidence-based reading programs for children and adults.

Indicator 1.2: #/% of young people at or above proficiency for 8th grade math

Strategy:

1. Increase the number of engaging, culturally appropriate, innovative and relevant math activities for youth in grades 5th through 8th.

Indicator 1.3: #/% of disconnected youth ages 16 to 24

Strategies:

1. Create and increase the number of, participation in and access to high quality reengagement programs for disconnected youth.
2. Identify, reach and connect vulnerable youth to appropriate and relevant support services.

JOINT APPLICATIONS ONLY

Result 2. All young people have resource-rich environments with prepared and engaged adults to support them in reaching their full potential

Indicator 2.1: #/% of young people who are chronically absent

Strategies:

1. Create an innovative "transition camp" for youth entering middle school and high school and their guardians to decrease future absenteeism and transition to the norms of the a new school environment.
2. Increase student and guardian ability to overcome obstacles to school attendance (e.g. asthma, mental illness, housing instability, lack of transit).

Indicator 2.2: #/% of students with disciplinary/behavioral referrals

Strategies:

1. Increase # of evidence based programs (e.g. TBRI) that:
 - a) ID students with behavioral issues.
 - b) Assess needs for behavioral support
 - c) Address needs based on assessment (e.g. OST, mental health support, etc.)
2. Develop advocacy programs for students referred for disciplinary/behavior reasons (e.g. OSS., ISS) & secure services for families.

Funding timeline: 2 years with option to renew for an additional 2 years

LIVE UNITED

Successful Students Result 1

Appendix A

Successful Students Impact Council Result 1: All young people are actively engaged in their communities and prepared for the 21st Century workforce

Through this RFP, United Way of San Antonio and Bexar County seeks applicants providing quality programming that supports on grade level reading by the end of 3rd grade. Priority will be given to applicants who approach the social emotional learning components tied to the indicator and submit data that demonstrates interventions/student-centered baseline recruitment criteria for students most in need. Successful proposals will demonstrate how program initiatives will provide services to youth in the above mentioned priority areas by way of:

Indicator 1.1: Number and percentage of young people at or above proficiency for 3rd grade reading

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

Target: The number of young people reading at or above proficiency in 3rd grade increases by 5%.

Available funding per indicator: \$750,000

Projected timeframe for impact: 2 years

Indicator	2018 Current Rate (not passing)	Total # Tested	5% Change
3 rd Grade Reading	6166	21,473	308

Strategy 1.1: Increase the number of diverse and evidence-based reading programs for children and adults.

Service Area: Bexar County. Applicants will need to demonstrate where students are most in need.

Performance Measures Strategy 1.1:

How much?	How well?
Number of 1 st grade students enrolled in program as participants	Percentage of participating 1st-3rd grade students attending 80%+ of program as scheduled
Number of 2 nd grade students enrolled in program as participants	
Number of 3 rd grade students enrolled in program as participants	Percentage of participating 1st-3rd grade students completing program (as defined by program standard)
Number of 1 st -3 rd grade students enrolled in programs as participants	

Successful Students

Single vs. Multiple Indicators

- SINGLE INDICATOR
- *One or more Programs*

- SINGLE INDICATOR
- *One or more programs*
- **INDICATOR 1.3 is JOINT ONLY**

Independent Applicant

Joint Applicant

Independent Applicant

Joint Applicant

- MULTIPLE INDICATORS
- *One or more Programs*

- MULTIPLE INDICATORS
- *One or more programs*

Successful Students Result 1

Successful Students Impact Council Result 1: All young people are actively engaged in their communities and prepared for the 21st Century workforce

Indicator 1.1: #/% of young people at or above proficiency for 3rd grade reading

Strategy

- Increase the number of diverse and evidence-based programs for children and adults

Service Area: Bexar County

Target: The number of young people reading at or above proficiency in 3rd grade increases by 5%

Available funding for indicator: \$750K

Successful Students Result 1

Successful Students Impact Council Result 1: All young people are actively engaged in their communities and prepared for the 21st Century workforce

Indicator 1.2: #/% of young people at or above proficiency for 8th grade math

Strategy

- Increase the number of engaging, culturally appropriate, innovative and relevant math programs for youth in 5th through 8th grades.

Service Area: Bexar County

Target: The number of young people at or above proficiency in 8th grade math will increase by 5%

Available funding for indicator: \$750K

Successful Students Result 1

Successful Students Impact Council Result 1: All young people are actively engaged in their communities and prepared for the 21st Century workforce

Indicator 1.3: #/% of disconnected youth ages 16 to 24

Strategies

- Create and increase the number of, participation in and access to high quality reengagement programs for disconnected youth.
- Identify, reach and connect vulnerable youth to appropriate and relevant support services

Service Area: Bexar County

Target: The number of disconnected youth will decrease by 10%

Available funding for indicator: \$1.5M

Successful Students Result 2

Successful Students Impact Council Result 2: All young people have resource-rich environments with prepared and engaged adults to support them in reaching their full potential

Indicator: #/% of young people who are chronically absent

Strategies

- Create an innovative “transition camp” for youth entering middle school and high school and their guardians to decrease future absenteeism and transition to the norms of a new school environment
- Increase student and guardian ability to overcome obstacles to school attendance

Service Area: Targeted high school feeders with high absences rates

Target: The number of young people who are chronically absent or at risk of becoming chronically absent will decrease by 10%

Available funding for indicator: \$1M

Successful Students Result 2

Successful Students Impact Council Result 2: All young people have resource-rich environments with prepared and engaged adults to support them in reaching their full potential

Indicator: #/% of young people with disciplinary/behavioral referrals

Strategies

- Increase the number of evidence-based programs that:
 - Identify students with behavioral issues
 - Assess needs for behavioral support
 - Address needs based on assessment
- Develop advocacy programs for students referred for disciplinary/behavior reasons and secure services for families

Service Area: Targeted high school feeder patterns

Target: The number of young people who are referred to DAEP will decrease by 10%

Available funding for indicator: \$1M

Successful Students

Budget, Budget Narrative and Co-Investment

- 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 United Way direct costs.
- Funds may not be used for capital improvements.
- All applicants must provide a full program budget and budget narrative as outlined in the RFP.
 - ❖ Independent vs. [Joint Program Budget](#)
- 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.

Strong Individuals and Families

Review of RFP for Strong Individuals and Families Impact Council

Strong Individuals & Families Impact Council

Scope of Work

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

Indicator 1: % of population at or below 200% of FPL

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.

Indicator 2: % of population between 200-300% of FPL

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.

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

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.

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

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

\$5 million for the entire Result; 5-year contracts; 5% decrease in targets in 5 years

Strong Individuals and Families Impact Council

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

Strong Individuals and Families

Single vs. Multiple Indicators

- SINGLE INDICATOR
- *One or more integrated programs*

- SINGLE INDICATOR
- *One or more integrated programs*

Independent Applicant

Joint Applicant

Independent Applicant

Joint Applicant

- MULTIPLE INDICATORS
- *One or more integrated programs*

- MULTIPLE INDICATORS
- *One or more integrated programs*

Strong Individuals and Families 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.

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

- **Strategy:** 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:** Please see Appendix A of the Strong Individuals and Families Impact Council Process Guide and associated definitions
 - **Service Area:** Bexar County with priority given to place-based approaches in applicant-selected zip codes or target areas based on data indicating need.

Strong Individuals and Families 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: % of population between 200-300% of Federal Poverty Level (FPL)

- **Strategy:** 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:** Please see Appendix A of the **Strong Individuals and Families Impact Council Process Guide** and associated definitions
 - **Service Area:** Bexar County with priority given to place-based approaches in applicant-selected zip codes or target areas based on data indicating need.
- **Strategy:** Support collective impact initiatives that convene community partners and stakeholders and which result in system-level changes that advance people beyond 300% of FPL.
 - **Service Area:** Bexar County

Strong Individuals and Families 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

- **Strategy:** 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:** Please see Appendix A of the Strong Individuals and Families Impact Council Process Guide and associated definitions
 - **Service Area:** Bexar County

- **Strategy:** 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:** Please see Appendix A of the Strong Individuals and Families Impact Council Process Guide and associated definitions
 - **Service Area:** Bexar County with priority given to place-based approaches in applicant-selected zip codes or target areas based on data indicating need.

Strong Individuals and Families 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: Incidents of family violence reports reported per 100,000 population

- **Strategy:** Expand prevention and/or intervention services that interrupt the cycle of family violence for individuals and families who are either at risk of family violence or who are already victims or perpetrators themselves.
 - **Required Standards of Provision of Services:** Please see Appendix A of the Strong Individuals and Families Impact Council Process Guide and associated definitions
 - **Service Area:** Bexar County with priority given to place-based approaches in applicant-selected zip codes or target areas based on data indicating need.

Strong Individuals and Families

Budget, Budget Narrative and Co-Investment

- 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 United Way direct costs.
- Funds may not be used for capital improvements.
- All applicants must provide a full program budget and budget narrative as outlined in the RFP.
 - ❖ Independent vs. [Joint Program Budget](#)
- 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.

Performance Measures for Both Impact Councils

Example: 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.

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</p>	

Independent & Joint Checklists for Both Impact Councils

- Agency related documents
- Program related documents
- Accountability Standards

Independent Checklist

READY CHILDREN IMPACT COUNCIL REQUEST FOR PROPOSAL CHECKLIST FOR INDEPENDENT APPLICATIONS		This Checklist must accompany your submission via e-CImpact.	
Agency Name _____	Contact Person _____		
Program Name _____	Title _____		
Address _____	Contact Phone _____		
Phone _____	Contact Email _____		
The following list represents all required elements of the RFP.		Completed and verified: Indicate completed with initial and date	
Please note United Way will not accept: <ul style="list-style-type: none"> • incomplete proposals • proposals submitted via mail/e-mail or delivered in person • proposals submitted after the deadline 		Initial	Date
Application Form in e-CImpact			
Organization Information Section			
Organization's Capacity Section			
Program Design Section (related Implementation Plan is a required document)			
Program Measurement and Evaluation Section (Narrative and Performance Measure form)			
Program Budget Section (Program Budget form and Narrative)			
Sustainability Section			
Required Documents (to be uploaded in e-CImpact)			
Implementation Plan Template			
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)			
Certificate of Non-discrimination			
Proof of Insurance			
Current list of Board of Directors			
Current Organizational Chart			

Joint Checklist

READY CHILDREN IMPACT COUNCIL REQUEST FOR PROPOSAL CHECKLIST FOR INDEPENDENT APPLICATIONS		This Checklist must accompany your submission via e-Clmact.	
Agency Name _____		Contact Person _____	
Program Name _____		Title _____	
Address _____		Contact Phone _____	
Phone _____		Contact Email _____	
The following list represents all required elements of the RFP.		Completed and verified: Indicate completed with initial and date	
Please note United Way will not accept: <ul style="list-style-type: none"> • incomplete proposals • proposals submitted via mail/e-mail or delivered in person • proposals submitted after the deadline 		Initial	Date
Application Form in e-Clmact			
Organization Information Section			
Organization's Capacity Section			
Program Design Section (related Implementation Plan is a required document)			
Program Measurement and Evaluation Section (Narrative and Performance Measure form)			
Program Budget Section (Program Budget form and Narrative)			
Sustainability Section			
Required Documents (to be uploaded in e-Clmact)			
Implementation Plan Template			
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)			
Certificate of Non-discrimination			
Proof of Insurance			
Current list of Board of Directors			
Current Organizational Chart			

Scoring Independent vs. Joint Application

- Accountability Review
- Review Independent and Joint Application Comparison
- Scoring Rubric for different applications

Independent Scoring Rubric

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)			

Joint Scoring Rubric

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)			

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Questions?

- Notecards
- Please submit any additional questions via email to:
 - rfpstudents@unitedwaysatx.org
 - rpfamilies@unitedwaysatx.org
- All additional questions regarding the RFP must be submitted by November 4, 2018 by 5:00 pm CST.
- For more information on Results Based Accountability visit:
 - <https://www.unitedwaysatx.org/results-based-accountability/>
- **The RFPs are due Thursday, November 15th at 12:00 noon!**