Request for Proposal (RFP) Workshop for FY 2021 (July 1, 2020 – June 30, 2021)

“We unite people, ideas and resources to improve the lives of people in Greater Plymouth County.”

January 22, 2020

United Way of Greater Plymouth County
Stand Together United!

"We need to get angry and understand what is at stake. And then we need to transform that anger into action and to stand together united and just never give up."

Greta Thunberg, Climate Change Activist
Our Service Area
22 Local Cities & Towns with Individuals Served FY 2019

Thank you for supporting your neighbors in need!

Geographic Breakdown of Individuals Served by United Way of Greater Plymouth County FY2019

Total Individuals Served Across Service Area: 33,295*

*Map does not include neighbors served with designated donations which were collected and allocated through our United Way workplace campaign efforts.
United Way of Greater Plymouth County focuses on the vital and interconnected needs of education, health and financial stability.
**Education**

Helping our children through early learning opportunities, after school initiatives, and vocational opportunities in order to ensure their graduation from high school and success in higher education and gainful employment.

**Health**

Promoting the physical and behavioral health of our most vulnerable neighbors with interventions aimed at protecting our children, treating substance abuse and mental illness, assisting those with developmental challenges and supporting our elders.

**Financial Stability**

Providing for the basic needs of food, shelter and clothing for our families and our most vulnerable neighbors as well as affording pathways for them to financial literacy, sustainable employment and decent, affordable housing.
Key Changes to RFP 2020 - 2021 Process

Form D – Initiative Budget Form

- **In-kind Support Guidelines**: It is acceptable to include in-kind donations that support the proposed initiative. The amounts must be within the Accounting Standards 116, reporting fair market value. If in-kind donations are included in the revenue of this budget, then there must be equal value recorded in the in-kind expense section.

- **Capital Expenditures**: United Way funding may be used for capital expenditures if the acquisitions align with the United Way of Greater Plymouth County mission and *directly improve the lives of individuals in need in greater Plymouth County*. United Way Year End Survey of Success Report will require an accurate number of individuals served by all funded initiatives, including initiatives involving capital.
Key Changes Continued

Please note last year’s 2019 implemented policies that will be continued:

- RFP Submission Limit: Agencies may submit up to **two (2) initiatives** per focus area (six initiatives maximum per agency)
- Allocation Requests: Requests are to be within the range of a minimum of **$5,000** and a maximum of **$25,000 per initiative**
- Initiatives Funded: In order to maximize impact, United Way will fund a total of **50 initiatives**
Summary of Regional Community Need Assessments

United Way of Greater Plymouth County

Prepared by United Way of Greater Plymouth County
January 2020
Summary of Regional Community Need Assessments

• UWGPC surveyed the broad landscape of our greater Plymouth County geography and collected ten needs assessments conducted within the past five years regarding the health and human service needs of our neighbors.

• We have summarized and placed the findings of these reports within our general framework of “Service Needs” focusing on the areas of health, education and financial stability and the more global “Systemic Needs” in order to serve as guides in making an application for United Way funds. Links to the actual source documents are included and all are urged to review these reports.

• Report can be accessed on our website: www.uwgpc.org/community-needs-assessments
Partner Agency Compliance Agreement

- United Way has partnership compliance, co-branding, and fundraising standards and policies intended to both provide mutual marketing benefits and to fully support the annual fundraising campaign.

- United Way will monitor for compliance.

- Agreement to be submitted with Forms A & B.
Partner Agency Agreement Cont’d

• **Co-branding requirements**
  Signage, logo usage, website (UWGPC to provide window decals, signs, and electronic logos)

• **Reporting requirements**
  Year end reports, success stories, outcomes

• **Partnership Events & Activities Requirements**
  Agency executives meetings, annual meeting, campaign kick-off & Day of Caring, Volunteer SouthCoast

• **Employee Campaign & Fundraising Requirements**
  Actively solicit employees and, if possible, complete prior to UWGPC community-wide campaign kickoff. All campaigns must be complete by the third Friday in November.
RFP Key Points & Tips

• Initiatives seeking United Way funds must be focused on services and activities that have clear and **measurable outcomes**. Measuring outcomes increases the effectiveness of your work to improve lives, communicates the value of your work to the community, and helps the United Way to raise additional resources.

• **Make outcomes clear, brief and direct**.
Key Points & Tips Cont’d

• The allocations process is a “volunteer-driven” process.

• Each RFP will be reviewed by a team of volunteer allocation panelists. Assume our panelists do not know about your initiative or the need area you are addressing. We will also share the changes to Form D (previously mentioned) at our panelist training.

• Encourage them to communicate any and all questions they may have, particularly about any inconsistencies between the narrative presentation and the site visit. (Points are often lost when these inconsistencies arise and are not explored or explained.)
Key Points & Tips Cont’d

• Though a scoring rubric is utilized, the allocations process is not an exact science, and other considerations including geographic spread of funded initiatives and funding balance among the need areas are made by our volunteer Board of Directors. The process, therefore, involves some subjective elements.

• United Way does not disclose specific scoring with applicants.
Please consider these additional key points and tips that very often resonate with our volunteer allocation panelists and Board of Directors.

- **Local** delivery of services, and **local** access of key decision-makers in an organization matter to our volunteers.

- **Targeted Need** means that United Way resources are to be directed to 15% of the local population of 500,000 or 75,000 of those who are of **low income**.

- The problems in our communities cannot be solved by any one organization, so create and emphasize strong and diverse **partnerships**.
Allocations Process Calendar & Key Dates
Calendar

2/7/20 – Deadline for Forms A & B with **all** required attachments

2/10/20 thru 2/14/20 **Finance Committee** reviews Applicants’ Financial Records

2/21/20 - Deadline for Forms C & D

3/10/20 – **Community Impact Committee** & **Allocations Panelists** Meeting

3/12/20 – 3/27/20 – Site visit dates **scheduled (NOT conducted)** with Agency Contact. Scheduling window is approximate.
Calendar Cont’d

3/11/20 - 4/30/20  **Allocation Panelists** will review Forms C & D and conduct Site Visits

5/01/20 – Allocation Panelist Scoring Sheets due back to United Way

5/12/20  **Community Impact Committee** to review scores and make Allocation recommendations for the May 20th Board of Directors meeting

5/20/20 – United Way  **Board of Directors** to vote on 2020 - 2021 Agency Allocations
RFP Forms A – D Overview
FORM A – Organization Profile

• Please submit **ONE** per Organization.

• Hard copy submission to United Way office is required for all forms and attachments. *No electronic submissions please.*

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United Way Community Impact Funding Request for Proposal 2020 - 2021

**Form A – Organization Profile**

Please type all responses. All information is required. Submit one per organization.

**Section 1**

Applicant Organization (full legal name) ____________________________

Name of Executive Director/President/CEO ____________________________

Doing Business as or Commonly Used Name ____________________________

Organization Acronym ____________________________

Previous Name (if changed) ____________________________

Address (main office) ____________________________

Mailing Address (if different from above) ____________________________

County (location of organization) ____________________________

Phone (____) ________ Fax (____) ________ E-Mail ____________________________

Agency RFP Contact: ____________________________

Title ____________________________

Phone (____) ________ Fax (____) ________ E-Mail ____________________________

**Section 2**

Mission Statement of Organization:

Accessibility:
1. Are organization’s building and office accessible to people with disabilities? __Yes ___ No
2. Are services accessible to people with disabilities? __Yes ___ No
3. Is organization accessible by public transportation? __Yes ___ No
4. Please name the counties and/or communities served by the organization. ________________________________________________

FORM A Revised 11/2019
FORM B – Eligibility Checklist

Please submit **ONE** per Organization

Please remember to submit **all** required documentation:

- **501(c)(3)** (Proof of non-profit status)
- DUNS Number (or statement that organization does not have a DUNS number)
- Board of Directors List and Meeting Minutes
- Most recent annual certified audit or financial statements and Annual Report
FORM B Continued

• IRS Form 990 or 990EZ
• Current Organization’s Fiscal Budget
• Signed Copy of the USA Patriot Act Certification Form (UWGPC form enclosed)
• Signed Copy of the Partner Agency Compliance Agreement (UWGPC form enclosed) & Samples
• Agree to complete Agency Site Visit Information Sheet and submit with Forms C & D
FORM C – General Initiative Proposal

Agencies may submit up to two (2) RFP’s per Focus Area*

*EDUCATION   *HEALTH   *FINANCIAL STABILITY

1. Annual Funding Request $5,000 - $25,000
   Request reasonable dollar amount per Initiative and provide percentage of the Total Program Revenues

2. Type of Strategy
   Systemic Change OR Direct Service

3. Contribution to Community Impact Focus Area
   Indicate Impact Focus Area that best describes outcomes to be addressed in this specific Initiative Proposal
FORM C –
General Initiative Proposal
Initiative Description

In the space provided please describe the design of the Initiative Project using the five listed criteria.

• Initiative Description must be submitted in writing and mailed/delivered with the other RFP Attachments.

• Initiative Description should **not** exceed the allotted space and be in **bullet point format**.

• Font: Arial, Size 11

Please submit original + four (4) hard copies of Forms C, D, and Site Visit Information Sheet
Initiative Description

1. Partnership Compliance (5 Points)

See Partner Agency Compliance Agreement

- If your organization **has received** United Way funds in the past year, you have previously signed a United Way Community Partnership Agreement. United Way will review compliance and score your organization according to the requirements of this agreement.

- If your organization **has not received** prior United Way funding, please describe your organization’s specific plan for meeting the partnership and co-branding requirements.
Initiative Description

2. Target Population (5 Points)

• Please describe the individuals or groups of individuals that you intend to serve with this initiative.

• Age, gender, race, disability, and other relevant descriptors.

• Unique characteristics of the target population, including special needs, risk factors, barriers or other challenges.
Initiative Description

3. Experience & Strategy (20 Points)

• Please describe strategy to address the specific need area chosen.

• State your organization’s experience in providing similar services.

• Describe how this initiative project is consistent with the mission and strategic goals of the organization.

• Cite research and/or evidence-based practices that support the proposed strategies to achieve chosen outcomes.
Initiative Description

4. Partnerships & Collaboration (20 Points)

• Please list any collaborative efforts in which the agency and project would actively participate that directly contribute to the achievement of the priority initiative outcome(s).

• Applicants are encouraged to develop collaborative proposals that build synergy between multiple agency and community partners.

• Please indicate if this proposal is collaborative, and if so, provide names & Contacts of all committed Collaborating Organizations on this page.
5. Local Impact & Outcomes (20 Points)

Please list at least one quantifiable, measurable outcome you plan to achieve for this initiative.
Site Visit (20 Points)

- Site visits are intended to give the Allocations Panelists a quick and general overview of your facility, staff and the people you serve. If possible, please plan visits during a time when program is “in action”.

- Allocation panelist team captains will call or e-mail agency contacts to schedule visits from approximately March 12th – 27th. Site visits will be performed any time from mid March – end of April.

- A site visit provides the opportunity for volunteer allocation panelists to witness the consistency of what is contained in the narrative of the proposal for the initiatives and the actual services, staffing and facilities involved in the proposal. Points can be lost for non-compliance issues.
Site Visits will cover

• On and Off Site Programs
• Staffing
• Evidence of Collaboration
• Evidence of Population Served
• Visual Evidence of United Way Partnership

United Way of Greater Plymouth County

Your United Way dollars at work.

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Your United Way dollars at work.

www.uwGPC.org
FORM D
Proposed Initiative Budget (10 Points)

• Please see key changes slide.

• Keep in mind that all figures should be Initiative Specific.

• Make sure you include all Revenues and Expenses related to the proposed Initiative. Revenues must equal expenses.

• If revenues and expenses listed on the Form D grid are self-explanatory, you may leave their respective section on the narrative blank. If notes are needed, please include in the narrative.

• Year End Report includes a request for the actual initiative revenues and expenses.
Accessing RFP Forms

www.uwgpc.org/funding
Or click “Funding” link on footer.

Kim Allen, Director of Community Relations & Marketing, kallen@uwgpc.org or
Dennis Carman, President & CEO, dcarman@uwgpc.org
508-583-6306
THANK YOU for your knowledge, your experience, and your generous and good natured approach to improving lives and making our communities safe and healthy places!