Request for Proposal (RFP) Workshop
for FY 2023 (July 1, 2022 – June 30, 2023)

“We unite people, ideas and resources to improve lives and to build a stronger community.”

January 13, 2022
Angela Williams III, President & CEO, United Way Worldwide

“The question is, ‘How can we work together to create a strategy that supports our vision, with tangible metrics and meaningful outcomes?’”
Our Service Area
22 Local Cities & Towns with Individuals Served FY 2021

Total Individuals Served Across Service Area: **60,719**
Thanks for supporting our neighbors in need!

Individuals served by 50 LIVE UNITED Initiatives, United Way’s Family Center, Mass 211, and SingleCare prescription savings partnership in 22 communities.
United Way of Greater Plymouth County focuses on the vital and interconnected needs of education, health and financial stability.
LIVE UNITED Recovery Fund

For this round of funding, expanding upon our work in 2021, we are focusing our efforts on our five LIVE UNITED Community Recovery areas as detailed on the next slide.

LIVE UNITED Recovery Fund: Our United Way, The Family Center and Community Connections are generating life saving resources though our annual campaign and grant seeking from private foundations to be directed toward “reimagining and rebuilding” our communities. While we continue to emphasize the interrelated pillars of Education, Health and Financial Stability, we continue to focus our efforts on five critically important initiatives.
LIVE UNITED Recovery Fund Focus Areas

• Feeding Our Families
• Housing & Homelessness
• Access to Affordable Health Services
• Support for Children & Youth
• Support for Job Training & Placement
LIVE UNITED Recovery Fund Cont’d

We will be seeking innovative partnerships from our community’s most compassionate, charitable organizations in order to have the greatest positive impact on the lives of our most vulnerable families and individuals resulting from the long-term effects of COVID-19.

Critical to our work in meeting these needs is the realization that for people of diverse backgrounds these challenges are greater and deeper in terms of their degree and complexity. This means that we must direct significantly greater attention and enhance our sensitivity to the issues of race, equity and justice as we design our solutions to our communities’ problems.
Key Changes to RFP 2022 – 2023 Process

• **One Part Submission Process**: In an effort to streamline and simplify our process, all forms and required attachments will be due on the same date rather than our historical two part submission process.

• **Three Forms to Complete**: To streamline, we have gone from four forms to three: Organization & Eligibility Profile, Initiative Narrative Proposal, and Proposed Initiative Budget.

• **Collective Impact Indicators**: To achieve maximum combined impact through United Way funded partners and initiatives, we are looking to develop a more standardized set of outcome measures.

• **Increased Partnership Compliance Score from 5pts to 10pts**: See partnership compliance agreement for more information.
Reminders from 2021

• **# of Initiatives**: Agencies may submit only one (1) RFP per Focus Area and a maximum of five (5) initiatives total. In order to maximize impact, United Way will fund a total of 50 initiatives.

• **Initiative Request Range**: Requests are to be within the range of a minimum of $5,000 and a maximum of $30,000 per initiative.

• **One Year of Operation Requirement**: All applicants must have at minimum one full year of operation including financial statements to be eligible to apply for funding.

• **Virtual Site Visits Continue**: All initiatives will be held virtually in the interest of safety due to COVID-19 and each initiative must have a virtual video call in place of traditional site visit.

• **Form Submission**: Hard copy submission of all forms and attachments will be required as in year’s past. Additionally, please e-mail submissions of Initiative Narrative & Budget to kscotland@uwgpc.org for our reviewers.
• 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 staff and allocation volunteers will monitor for compliance.
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, demographic information, 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

- **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.** Please also be aware of the collective impact indicators this year.
Key Points & Tips Cont’d

• The allocations process is “volunteer-driven”. 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. Encourage them to communicate any questions they may have, particularly about any inconsistencies between the narrative presentation and the site visit (virtual this year).
• **Subjective elements** 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. United Way does not disclose specific scoring with applicants, though we do share general comments on how a future application may be improved.
Key Points & Tips Cont’d

Please consider these additional key points and tips that very often resonate with our volunteer allocation panelists and Board of Directors.

• **Local Impact:** Delivery of services in greater Plymouth County, and **local** access of key decision-makers in an organization matter to our volunteers.

• **Targeted Need:** 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**.

• **Partnerships:** The problems in our communities cannot be solved by any one organization, so create and emphasize strong and diverse collaborative efforts with others in the community.
Virtual Site Visit Tips

• This is our third year utilizing video site visits due to the pandemic. Successful virtual site visits have included:
  • Simple, pre-recorded tours of agency space when possible. It is helpful to pre-record a video and show via “share screen” during the site visit to help prevent technical/audio difficulties that may occur during “live tours” when possible.
  • Photos and testimonials from individuals served are also very helpful.
Allocations Process Calendar & Key Dates
Calendar

2/18/22 – Deadline for forms submission with all required attachments

2/21/21 thru 2/23/22 Finance Committee reviews Applicants’ Financial Records

3/8/22 – Community Impact Committee & Allocation Panelists Meeting

3/9/22 – 3/31/22 – Site visit dates scheduled with Agency Contact. Scheduling window is approximate.
Calendar Cont’d

3/9/22 - 4/30/22 *Allocation Panelists* will review funding requests and conduct Virtual Site Visits

5/2/22 – Allocation Panelist Scoring Sheets due back to United Way

5/10/22 *Community Impact Committee* to review scores and make Allocation recommendations for the May 19th Board of Directors meeting

5/19/22 – United Way *Board of Directors* to vote on 2022 – 2023 Agency Allocations
RFP Forms Overview
Organization & Eligibility Profile

• Please submit ONE per Organization.

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

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

All forms, with required documentation, must be received via hard copy submission by 4:00 p.m. on Friday, FEBRUARY 18, 2022.

Applicant Organization (full legal name) ___________________________________________________________

IRS EIN (Tax ID)# (to verify nonprofit status on GuideStar Charity Checker) ___________________________

Name of Executive Director/President/CEO ___________________________________________________________

Address (main office) __________________________________________________________

Mailing Address (if different from above) __________________________________________________________

County (location of organization) __________________________ Website _____________________________

Phone (______) __________________ E-Mail __________________________

Agency RFP Contact __________________________ Title __________________________

Phone (______) __________________ E-Mail __________________________

Mission Statement of Organization:

Organization Service Area - Counties and Communities Served:

Organization Diversity, Equity, and Inclusion Statement:

Organization Disability Accommodation (ADA) Statement:
Eligibility Checklist

Please submit **ONE** per Organization

Please remember to submit all required documentation:

- IRS EIN (Tax ID) # (to verify non-profit status)
- Mission Statement, Organization’s Service Area, DEI Statement, and Disability Accommodation Statement (ADA)
- Board of Directors List and Meeting Minutes
- Most recent annual certified audit or financial statements and Certificate of Solicitation. *All applicants must have at minimum one full year of operation including financial statements to be eligible to apply.*
Eligibility Checklist Continued

• IRS Form 990 or 990EZ
• Current Organization’s Fiscal Budget
• Nondiscrimination Policy

• Signed Copy of the USA Patriot Act Certification Form (UWGPC form enclosed)
• Signed Copy of the Partner Agency Compliance Agreement (UWGPC form enclosed) & Samples
Initiative Narrative Proposal

Agencies may submit one (1) RFP per LIVE UNITED Recovery Area

1. Annual Funding Request $5,000 - $30,000
   Request reasonable dollar amount per Initiative and provide percentage of the Total Program Revenues

2. Type of Strategy
   Systemic Change OR Direct Service

3. LIVE UNITED Recovery Area
   Indicate Impact Focus Area that best describes outcomes to be addressed in this specific Initiative Proposal
Initiative Narrative 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 one hard copy of the Initiative Narrative, Budget, and Site Visit Information Sheet. Additionally, please **e-mail** submissions of these forms to kscotland@uwgpc.org for our reviewers.
Initiative Description

1. Partnership Compliance (10 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 input from our reviewers, 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, with a sensitivity to underrepresented/historically disadvantaged groups in an effort to affirm diversity, equity, inclusion.

• 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 (15 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.

- Clearly identify the partnerships and detail the specific roles of each partner.
5. Local Impact & Outcomes (20 Points)

Measurable Collective Impact Outcomes: To achieve maximum combined impact through United Way funded partners and initiatives, we are looking to develop a more standardized set of outcome measures.

Indicators were generated by United Way Worldwide gathered from a large sampling of local United Ways and their community partners. Please align your outcomes to these indicators and select those the initiative is focusing on. If your proposed initiative aligns with an alternative or additional indicator(s) please share justification for its use.
Collective Impact Outcomes

Feeding Our Families
- People will be fed
- Meals will be distributed to feed hungry neighbors
- Individuals or families will receive nutrition or cooking courses
- Individuals/families will no longer be food insecure
- Children/youth will obtain healthy food and nutrition they may not otherwise have
- Other (Please describe)

Housing & Homelessness
- People will access affordable housing, financial products, and other living services
- Military veterans will be placed in permanent housing
- Families or individuals will be placed in housing
- Individuals accessing crisis housing will engage with case management to develop a client-centered service plan
- Homeless individuals will access immediate, emergency shelter
- Individuals in crisis will avoid utility disruption
- Individuals in crisis will avoid eviction
- Other (Please describe)

Accessing Affordable Health Services
- People will take part in physical activity and/or healthy food access or nutrition programs
- Children/adults will eat healthier, increase physical activity, or move toward a healthier weight
- People will receive preventative care support, leading to healthier lives
- People will receive behavioral health services, leading to healthier lives
- People will receive domestic violence services, leading to healthier lives
- People will receive intellectual and developmental disability services, leading to healthier lives
- People will receive access to health insurance
- Other (Please describe)

Support for Children & Youth
- Youth will graduate high school
- Children will receive literacy support, leading to greater success at school
- Children will receive academic growth through after-school programs
- Youth will gain the knowledge, skills, and credentials to get a good job
- People will be positively impacted through college-preparation programs
- Families will be provided with educational resources and training
- Other (Please describe)

Support for Job Training & Placement
- People will be helped with financial education, literacy, coaching or other service to receive a job
- Military veterans will obtain jobs
- People will receive employment counseling and career mentorship
- People with increase their disposable income by accessing benefits and/or reducing costs
- Other (Please describe)
5. Local Impact & Outcomes Continued

Please specify the number of people projected to be served by the initiative as well quantified outcomes being utilizing in this initiative. For example, “35 youth will increase reading levels from 3rd to 4th grade by completion of project”. 
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.
- Allocation panelist team captains will call or e-mail agency contacts to schedule visits from approximately March 9th – 31st. 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.
Virtual Site Visits Continue for 2022

• We will be holding all site visits virtually this year in the interest of safety. All initiatives must have a virtual site visit.

• We recommend using a video conference for the visit to showcase the agency, its staff, and services. Agencies may provide a virtual “tour” of the space when possible.

• Agencies may also share photos and videos of the initiative in action with allocation panelists via e-mail if available.

• United Way encourages creativity during this unique time. Thank you for your flexibility and positive approach!
Site Visits will cover

- On and Off Site Programs
- Staffing
- Evidence of Collaboration
- Evidence of Population Served
- Visual Evidence of United Way Partnership (if previously funded)
Proposed Initiative Budget (10 Points)

- 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 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.
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.
Accessing RFP Forms

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

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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!

United Way of Greater Plymouth County