

Request for Proposal (RFP) Workshop

for FY 2024 (July 1, 2023 – June 30, 2024)

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

January 12, 2023

United Way of Greater Plymouth County



“Overcoming poverty is not a gesture of charity. It is an act of justice. It is the protection of a fundamental human right, the right to dignity and a decent life.”

- Nelson Mandela



Our Service Area

22 Local Cities & Towns with Individuals Served FY 2022

GEOGRAPHIC BREAKDOWN OF INDIVIDUALS SERVED FY2022

Total Individuals Served Across Service Area: **57,626**

Thanks for supporting our neighbors in need!



United Way of Greater Plymouth County focuses on the vital and interconnected needs of **education**, **health** and **financial stability**



LIVE UNITED Poverty-Focused Areas of Intervention

For this round of funding we are focusing our efforts on our **five LIVE UNITED Community Poverty-Focused Areas of Intervention** as detailed on the next slide.

Our United Way, The Family Center and Community Connections are generating life saving resources through our annual campaign and grant seeking from private foundations to be directed toward building stronger communities. While we continue to emphasize the interrelated pillars of Education, Health and Financial Stability, we will be funding efforts that positively impact the larger issue of poverty.

According to the U.S. Census Bureau, 7.5% of the population in Plymouth County are currently living below the poverty line.

LIVE UNITED Community Poverty-Focused Areas of Intervention:

- Feeding Our Families
- Housing & Homelessness
- Access to Affordable Health Services
- Support for Children & Youth
- Support for Job Training & Placement



LIVE UNITED Community Poverty-Focused Areas of Intervention 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.

Critical to our work in meeting these needs is the realization that for people in historically marginalized communities 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 2023 – 2024 Process

NEW

- **New online system** for applying!
- **Plan to Return to In-person Site Visits**
Virtual visits may be requested under certain circumstances at the discretion of the agency
- **Common Indicator of Poverty:** Initiatives receiving funding will be asked to share in Year End Reporting the percentage (%) of individuals served who increased their disposable income by accessing benefits and/or by reducing costs through funded initiative
- **Initiative Summary Question**

Additional Guidelines

- **# 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.
- **One Part Submission Process:** 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. All requests must be submitted electronically this year (no hard copy submissions!)

Guidelines Cont'd




- **Three Portions to Complete:** 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 developed a more standardized set of outcome measures.

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. Organizations receiving United Way of Greater Plymouth County funding are required to perform the following:
- United Way staff and allocation volunteers will monitor for compliance.

United Way of Greater Plymouth County
Funded Community Partner Compliance Agreement


United Way of
Greater Plymouth County

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. Organizations receiving United Way of Greater Plymouth County funding are required to perform the following:

- 1) Co-Branding Requirements**
 - **Signage** (Signs and decals supplied by United Way)
Visibly display United Way provided signage as appropriate to your building/office space.
 - **Logo Usage** (electronic logos supplied by United Way)
Include a 1-color, full color or black & white United Way Partner Agency logo and/or text line reading "A United Way Partner Agency" on: agency/program newsletters, brochures for United Way-funded programs, annual reports, agency/program letterhead, & agency event invitations and programs
 - **Website**
Identify United Way partnership with UWGPC logo and provide a link to www.uwgpc.org.
 - Other creative co-branding activities are encouraged and appreciated such as United Way logo on clothing items (activity/event t-shirts as appropriate), vehicle decals, phone greetings, etc.
- 2) Reporting Requirements**
 - **Year End Reports & Success Stories**
Complete and submit a Year End Report for each funded initiative. (Report will be supplied to all agencies at the end of each funding cycle.) Please report succinctly on the intended outcomes of your proposal. Please also be prepared to provide the following information on your Year End Report: Actual initiative revenues and expenses; number served by city/town; age of those served; gender of those served; race & ethnicity of those served; and income level of those served.
 - Submit annually a minimum of one client/program success story per initiative, which is tied to results your agency is achieving in support of the Community Impact Initiative.
- 3) Partnership Events & Activities Requirements**
 - Consistently send a representative to United Way Agency Executives meetings.
 - Participate in Agency Exhibition at United Way Annual Meeting and send at least one representative to event.
 - Attend Campaign Kickoff event and provide volunteer Day of Caring project(s).
 - Upon request, provide speakers, displays and/or tours in support of the annual campaign or other efforts.
 - Register with and utilize UWGPC Volunteer SouthCoast program for volunteer opportunities: www.volunteersouthcoast.org.
 - Collaborate in media efforts/approaches.
 - Mention United Way funding partnership in newspaper releases/media contact that relate to programs/services/initiatives funded by United Way and in other releases/contacts as appropriate. For example, use the sentence "_____ a United Way partner agency is launching..."
- 4) Employee Campaign & Fundraising Requirements**
 - **United Way Employee Campaign:** Actively solicit employees and, if possible, complete prior to community-wide campaign kickoff. All campaigns must be complete by the third Friday in November.
 - Organizations funded by United Way are prohibited from conducting workplace campaigns to directly benefit their organization as workplace campaigns are the primary source of generating resources for United Way to benefit our community partners.
 - Organizations receiving United Way funding shall not promote or encourage designations to own organizations.
 - Applying for government grants and non-corporate foundation grants can take place at any time of the year.

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.



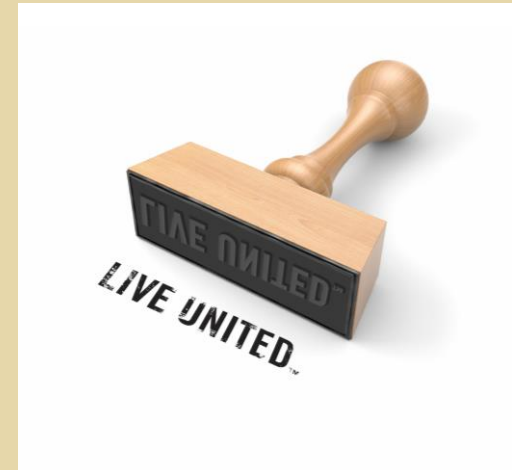
Key Points & Tips Cont'd

- The allocations process is **volunteer-driven**. Each RFP will be reviewed by a team of volunteer allocation panelists and will have a site visit.
- 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.



Key Points & Tips Cont'd

- **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 by request.



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 7.5% of the local population of over 500,000 who are below the “poverty level”.
- **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.

Together, we can lift up our communities!

Allocations Process Calendar & Key Dates



Calendar

2/17/23 – Deadline for forms submission with all required attachments via online portal

2/20/23 thru **2/24/23** Finance Committee reviews Applicants' Financial Records

3/7/23 – Community Impact Committee & Allocation Panelists Meeting

3/8/23 - 4/30/23 Allocation Panelists will review funding requests and conduct Site Visits (visits scheduled with agency contact in March)

Calendar Cont'd

5/1/23 – Allocation Panelist Scoring Sheets due back to United Way

5/11/23 Community Impact Committee to review scores and make Allocation recommendations for the May 18th Board of Directors meeting

5/18/23 – United Way Board of Directors to vote on 2023 – 2024 Agency Allocations

RFP Forms Overview

United Way of Greater Plymouth County

Apply

Apply

Quick Search

United Way Community Impact Funding Request for Proposal(s) July 1, 2023 – June 30, 2024

The United Way of Greater Plymouth County RFP is a one-step submission process with all forms and required attachments due on the same date (detailed below).

All agencies/organizations applying for funding through the United Way of Greater Plymouth County must complete the Organization & Eligibility Profile with all required documentation.

Completed Organization & Eligibility Profile, along with all required documentation, must be submitted via our online portal on or before 4:00 p.m. **FRIDAY, FEBRUARY 17, 2023.**

Only submit one Organization & Eligibility Profile, along with all required documentation, per agency/organization regardless of how many proposals you plan on submitting.

[Initiative Narrative Proposals](#)

Agencies/organizations applying for United Way funding, addressing the five LIVE UNITED Community Poverty-Focused Areas of Intervention, must complete and submit Initiative Narrative Proposal and Proposed Initiative Budget forms.

Completed Initiative Narrative Proposal and Proposed Initiative Budget forms must be submitted via our online portal on or before 4:00 p.m. **FRIDAY, FEBRUARY 17, 2023.** Please submit one set for each Initiative proposed.

Apply here

Organization & Eligibility Profile

- All agencies will create a new profile on Foundant (our online grant portal) which will capture information such as IRS EIN # (Tax ID) to verify non-profit status, address, etc.
- **Questions List** can be downloaded to preview all questions
- Executive Director/CEO required to sign off electronically; can use “Collaborate” feature as needed
- Will be asked for RFP contact, towns served, as well as mission statement, ADA statement, and DEI statement
- **If you are applying for multiple initiatives, only need to fill out Org. & Eligibility Profile once.**



Eligibility Checklist

Will be asked to confirm your organization meets all of the following requirements:

- Has current Board of Directors meeting regularly and meeting minutes are maintained.
- All applicants must have at minimum one full year of operation including financial statements to be eligible to apply.
- Has stated policies of nondiscrimination and complies with all the requirements of state and federal laws and regulations on nondiscrimination and equal opportunity with respect to clients, officers, employees and volunteers.
- Does not knowingly employ individuals or contribute funds to organizations found on terrorist-related lists officially announced by the U.S. Government, the United Nations or the European Union.

Eligibility Checklist Cont'd

- Confirms that all staff and/or volunteers working directly with clients have been properly CORI'd.
- Agrees to comply with United Way's partnership marketing and fundraising and accountability requirements.
- Agrees to fully complete and submit Year End Reports for each funded initiative by the designated due date.
- Has fully completed and submitted all Year End Reports for July 1, 2021 - June 30, 2022. (if applicable).



Required Uploads

Please remember to upload all required documentation:

- Board of Directors List with Terms of Offices
- Most recent annual certified audit or financial statements
- Certificate of Solicitation
- IRS Form 990 or 990EZ
- Current Fiscal Year Budget for Organization
- Nondiscrimination Policies
- Signed UWGPC USA Patriot Act Certification Form (provided)
- Signed UWGPC Partnership Compliance Agreement (provided)
- Samples of letterhead, program brochures, and Annual Report

Initiative Narrative Proposal

Agencies may submit one **(1)** RFP per **LIVE UNITED Area of Intervention** for a maximum of five **(5)** initiatives total

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 Focus Area

Indicate Poverty-Focused Area of Intervention that best describes outcomes to be addressed in this specific Initiative Proposal

Initiative Narrative Proposal

Initiative Description

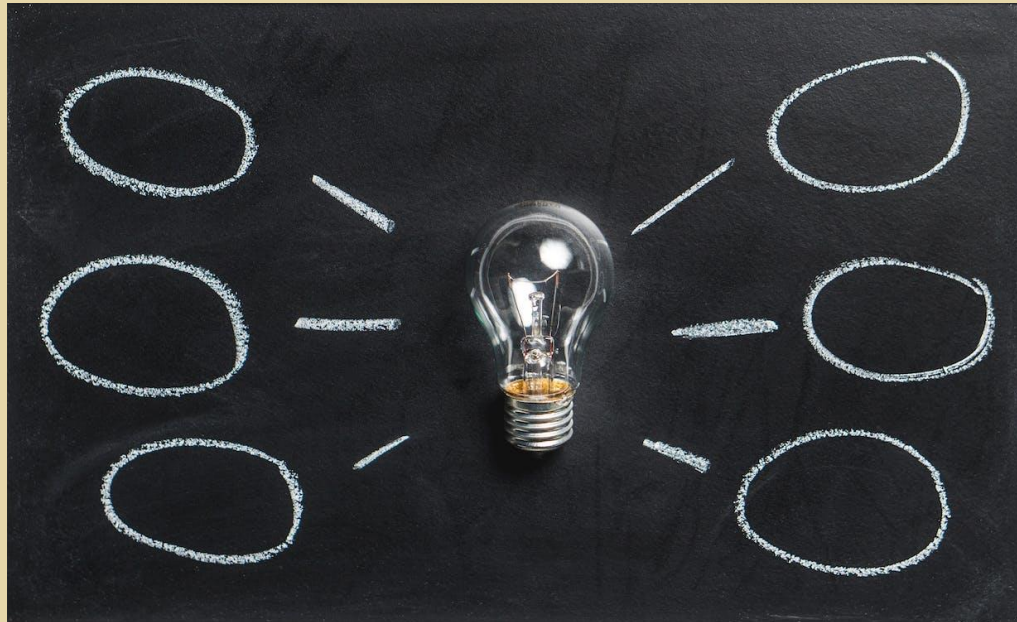
In the space provided please describe the design of the Initiative Project using the five listed criteria.

- Initiative Description should not exceed the allotted character limits and be in **bullet point format**.

Initiative Summary

NEW

Please summarize your initiative in one to two sentences.



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.



Initiative Description

5. Local Impact & Outcomes (20 Points)

Measurable Collective Impact Outcomes: To achieve maximum combined impact through United Way funded partners and initiatives, we have developed 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.

Common Indicator of Poverty: Initiatives receiving funding will be asked to share in Year End Reporting the percentage (%) of individuals served who increased their disposable income by accessing benefits and/or by reducing costs

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 8th – 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.**

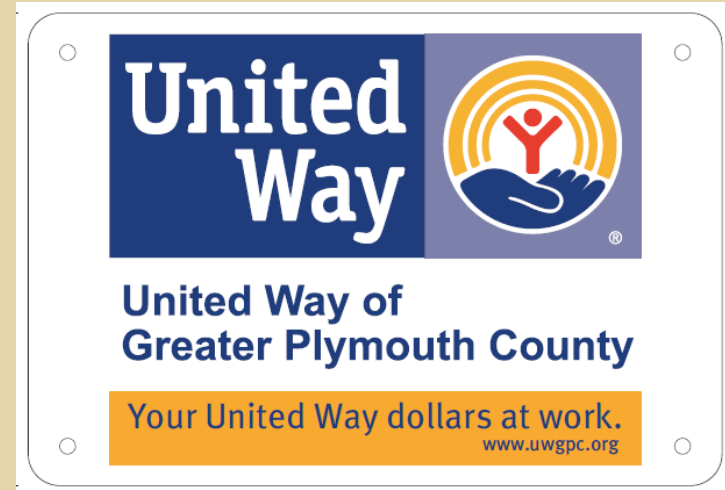
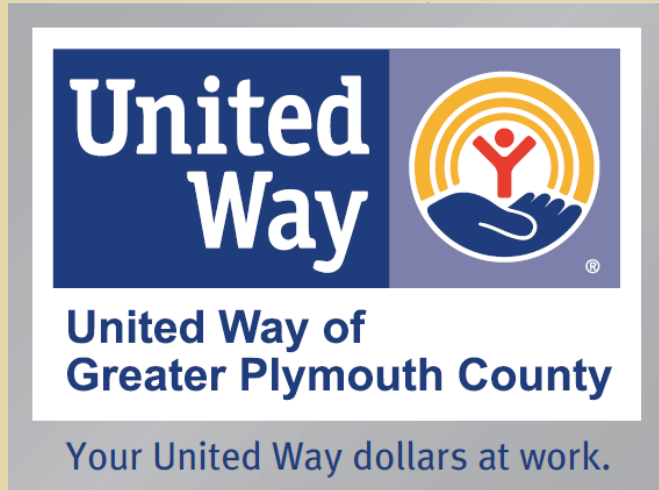
Site Visits Return to In Person!

- **United Way of Greater Plymouth County is excited to be returning to in-person site visits in 2023.**
- Under certain circumstances at the discretion of the agency requesting funding, a virtual site visit may be requested. If your agency anticipates the need for a virtual visit, please note this on Site Visit Info Form.
- *All efforts will be made to ensure site visits held in-person and virtual site visits are evaluated using equivalent scoring and criteria. Virtual requests may be evaluated by the UWGPC Community Impact Committee.*



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)

- Budget form to be downloaded from UWGPC website and uploaded to Foundant.
- 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.

Initiative Budget Form Cont'd

- **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 Online Portal

www.uwgpc.org/funding

Or click “Funding” link on footer.

Kim Scotland, Director of Community Relations & Marketing,
kscotland@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!

United Way of Greater Plymouth County

