

# YEAR-END REPORTS AND FULL GRANT PROPOSAL MEETING 2018

March 23, 2018



United Way  
of Whatcom County

# AGENDA

Overview of United Way of Whatcom County

Funding Priorities

Year-End reports and 1-Year Proposals

Questions



# OUR MISSION

To serve Whatcom County to Unite community resources around a common cause that measurably improves lives.

# FUNDING PROFILE

- Health & human service programs, currently over 30 programs
- Average grant size of \$26,000
- Grants underwrite operational expenses and may provide capacity building support
- Grants issued this year will span one year
- Grantees are expected to be active partners, engaging in workgroups, events, and other possible opportunities for collaboration



# OUR FORMER ISSUES OF FOCUS

Education. Income. Health.

# OUR NEW SINGLE-ISSUE FOCUS

Families and individuals who struggle financially.



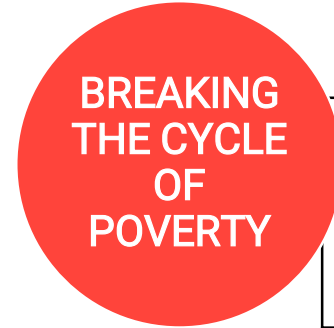
# NEW FUNDING PRIORITIES



combating food insecurity
stable, sustainable, affordable housing
healthcare access
open/other



financial literacy and training
vocational readiness training and/or support
open/other



affordable childcare and early-learning programs
academic programs to increase student attendance and achievement
parenting support
open/other



# BASIC ELIGIBILITY REQUIREMENTS

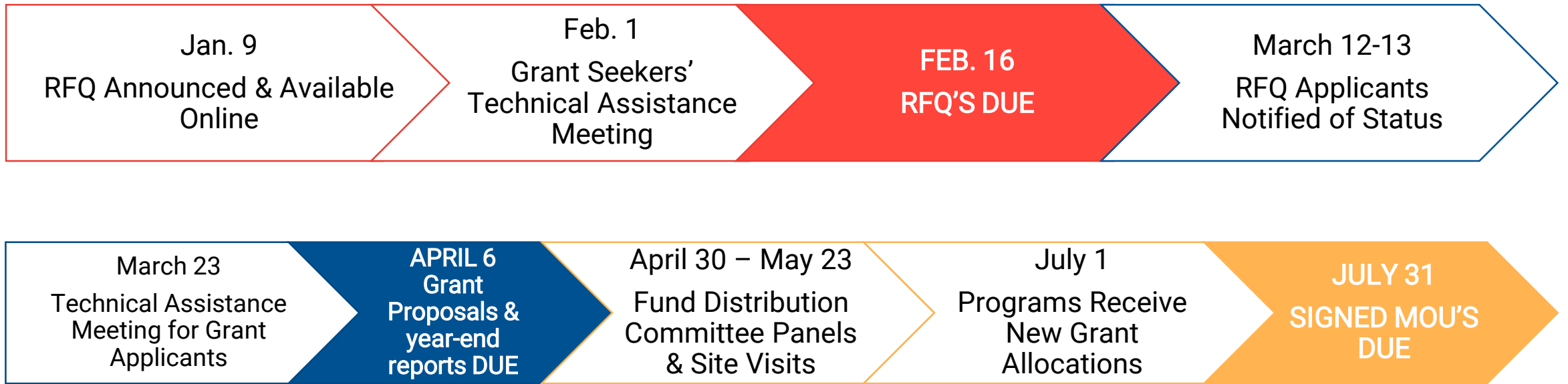
- Clearly aligns with funding priorities
- Tax Exempt, nonprofit organization in Whatcom County
- Program uses evidence-based practices that affect community metrics
- Non-discriminatory
- Active board of directors
- Sound financial management

## ADDITIONAL RATIONALE FOR FUNDING CONSIDERATIONS

- Solution-focused
- Able to display positive, measurable results
- Illustrates a need for funding
- Possesses adequate organizational capacity



# FUND DISTRIBUTION KEY DATES



# WALK-THRU YEAR-END REPORT





# FORMAT FOR YEAR-END PRESENTATIONS

- Takes Place at United Way
  - 20 mins. in length - total
  - General overview of the program
  - Successes/Challenges
  - Personal Stories/Images/Videos
  - Q&A
- ❖ We will email your assigned presentation time and date. Presentations will take place on either a Monday, Tuesday, or Wednesday from April 30<sup>th</sup> through May 16<sup>th</sup>



# QUESTIONS?



# WALK-THRU 1-YEAR PROPOSAL



# SITE VISIT: FORMAT FOR ONE-YEAR GRANT PROPOSALS

- ~45 min for presenting Agency and Program(s) to ~15 panel volunteers and UW staff
- Meet agency board member & staff member, maybe clients
- Provide details of how programs are offered to the community & achievement of outcomes
- Describe the use of UW Community Impact Grants and overall finances
- Tour of facility, if relevant (included in allotted time)
- Allow 10-15 mins. for questions from the panel



# SITE VISIT: FORMAT FOR ONE-YEAR GRANT PROPOSALS

5 min.	<b>Agency Overview</b> Introductions, Mission, History, Range of Services - Board/Staff Management Strategic Issues
10 min.	<b>Program Overview</b> Highlights of Logic Model Measurable Outcomes, Service Delivery trends What's Changed Client Success Stories
5 min.	<b>Finance Overview</b> Budget highlights, Changes to Income/Expense Fund Balances, Status of Reserves & Endowments
5 min.	<b>Closing</b> Restate Case for Funding
15 min.	<b>Questions and Discussion with Panel</b> Expect questions on attachments & multi-year trends
5 min.	<b>Tour</b>



# EXPECTATIONS UPON BEING AWARDED A GRANT

1. Complete memorandum of understanding (MOU)
2. Receive your funding (monthly disbursements)
3. Be a great partner
  - Help advocate for United Way of Whatcom County
    - Examples:
      - social media mentions
      - conduct a workplace campaign at your organization
      - thank us at your events
    - Participate in collaboration opportunities
      - Examples:
        - monthly forum/work groups focused on issue
        - help us define shared metrics
        - summit
4. Prepare Year-End Report



# QUESTIONS?

