

1-YEAR FUNDING PROPOSAL 2019

United Way of Whatcom County is offering 1-year funding to select non-profits who help families and individuals increase their financial security. Applicants are required to provide information about both the organization and the specific program seeking funding.

Submit your funding proposal and supplemental materials by 4pm on Friday, April 5th, 2019 via e-mail to mweinstein@unitedwaywhatcom.org. Include all attachments in digital format.

INSTRUCTIONS FOR THE 1-YEAR FUNDING PROPOSAL

Section A: Agency Information (maximum of three pages to answer Sections A and B)

We are looking for big picture information in this section. Share your mission and why your organization is the best at what it does. Explain why you are seeking to work with United Way at this time. Link your mission and goals with ours.

- A1. List agency mission as it appears in by-laws and public documents.
- A2. Summarize agency qualifications and experience (*e.g. years of operation, accreditations, experience of staff and volunteers, etc.*).
- A3. Describe why you are seeking to work with united Way at this time.
- A4. Describe collaborations with United Way (*e.g. participating in committees and task forces, providing campaign speakers, conducting employee campaigns, etc.*).
- A5. Describe collaborations with other programs and agencies (*e.g. shared caseworkers, planning and coordination, intake assessment, facilities, etc.*).
- A6. Describe any substantial changes within the agency over the previous year, or any major changes anticipated for the coming year.

Section B: Program Information (maximum of three pages to answer Sections A and B)

In this section, we are looking for information specific to the program seeking funding. Tell us about the program's activities and people helped. Cite local data on the importance of your issues. We are interested in quantifiable outcomes and expect you to address how you measure the impact of your program. We will consider how your program may complement our current investments.

- B1. Describe services of the program.
- B2. Describe the target population and geographic area of the program. Describe how the program addresses the needs of the ALICE population and the portion of recipients that enter services at or below the ALICE threshold.
- B3. Describe the community need addressed by the program (*e.g. transitional shelter for women with children, access to affordable child care, etc.*). Note the data or research used to identify the need (*e.g. Homeless Coalition Gaps Analysis, risk and protective factors for youth, agency needs assessment, etc.*).

- B4. Describe how the program is targeted toward diverse populations, if applicable (*e.g. multilingual staff and materials, etc.*).
- B5. Describe any substantial changes within the funded program during the past year, or anticipated major changes to the program in the coming year.

Section C: Funding Priorities

This section identifies our three funding priorities and the respective impact tools we are looking to fund in order to address those priorities. Please select the one impact tool your program aligns best with and provide a description of how your program affects the larger funding priority. It's important you cite evidence that your program can make a difference.

Section D: Logic Model (maximum of two pages)

Fill in the form provided. The boxes will extend to accept text as it is entered.

- Inputs: Brief listing of the resources dedicated to the program (*e.g. staff and volunteers, sources of funding, facilities and equipment, collaborations, etc.*).
- Activities: Describe what the program does (*e.g. the transitional housing program provides temporary housing, case management, life skills training, and counseling for homeless women, etc.*)
- Outputs: Describe the intended direct products of program activities (*e.g. The transitional housing program will serve approximately 25 women next year; Approximately 480 bed nights will be provided; 52 life skills classes will be taught, and 150 hours of counseling provided, etc.*).
- Outcomes: Describe the intended benefits for participants during and after program activities. Please list the most significant outcome (*e.g. participants in the transitional housing program succeed in moving to safe and affordable house; participants demonstrate ability to apply for work, register for school, or access TANF; participants learn to develop long and short-term goals and the strategies to achieve them, etc.*).
- Goals: Describe the overall goal of the program (*e.g. Increase self-sufficiency & reduce recurrent homelessness etc.*).

Section E: Outcome and Indicators (maximum of two pages)

- E1. Describe the key outcome you intend to report on for the upcoming funding period. List one to three indicators for the key outcome (*i.e. the specific data that will be measured to track progress toward the outcome*) and include your data collection method for each indicator (*e.g. rating by trained observer, pre and post tests, self-administered questionnaire, review of program records, etc.*).
- E2. Report your year-end results for the past year, including the number of outputs, persons served, and indicator results (*i.e. the total number served, the percent that achieved the specified indicator, etc.*).

- E3. If your program is currently receiving United Way funding and you have selected a new key outcome to report on, please complete this additional table to report key outcome and results. If your key outcome has not changed, skip E3 and E4 and proceed to section F.
- E4. Describe what you have learned from the data you collected and discuss any changes to your program as a result of this information.

Section F: Program Budget Narrative

- F1. List all budget line items with changes of 20% or greater (from the current year compared to year one of your proposed budget), and provide a brief explanation of the change.
- F2. Describe any major changes financial changes that occurred during the previous year (*Loss of funding source, major new expenses, capital project, etc.*).
- F3. Describe the rationale for the amount you are requesting from United Way.

Excel Program Budget

- There is a separate Excel form for program budgets that you must complete to provide the requested information. Enter the program budget data into the spreadsheet. Formulas are calculated automatically.
- Budget figures should correspond to a July-June fiscal period.
- Line Item Descriptions:
 - 4000 through 4100 – Contributions: Contributions are to include only amounts received for which the donor derives no direct tangible benefit from the agency.
 - 4200 – Special Events: This classification is provided to reflect support and incidental revenue derived from all of an agency's special fund raising events.
 - 4300 – Legacies & Bequests: A legacy or bequest is a gift made through a will or a living trust at the donor's death.
 - 4500 – Contributed by Affiliated Organizations: Public support derived from Combined national-local fundraising campaign.
 - 4700 through 4710 – United Way Contributions: Allocations from United Way of Whatcom County, other forms of support received from United Ways fund raising.
 - 4800 – From other Federated Fundraising Organizations: Support received from specialized fund raising organizations that are not associated with your agency.
 - 5000 – Fees, Grants and Contracts from Government Agencies: All support and revenue that your agency receives from governmental sources.
 - 6000 – Membership Dues (Individuals): Amounts received for personal memberships that procure directly for the member tangible benefits commensurate in value with the amount of dues.

- 6100 – Assessments and dues (Local Member Units): Amounts received from member agencies (at the local, state and regional levels) for general membership benefits.
- 6200 – Program Service Fees & Net Incidental Revenue: Revenue from activities that include agency sponsored student conferences, provision of display space to exhibitors at events and neighborhood self-improvement projects.
- 6300 – Sales of Materials and Services to Local Member Units: Sales of publications and materials, consultation and other services.
- 6400 - Sales to Public: Sales of program related publications and materials to the general public.
- 6500 – Interest & Dividend Income: Interest from Savings, Investment and unrestricted Endowment accounts.
- 6510 – Gross Rental Income: Income from real estate investment.
- 6600 – Gains (or Losses) on Investments Transactions: The net amount of gains or losses on investments.
- 6900 – Miscellaneous Revenue: Other income not listed in any other category for only one time occurrence.

Section G: Attachments

Please supply the following materials in electronic form. Using the naming convention indicated below, email the 1-year funding proposal and supplemental files as pdfs to mweinstein@unitedwaywhatcom.org by **4PM on Friday, April 5th, 2019.**

- 1-Year Funding Proposal 2019
“Agency name_Proposal 2019”
- Program Budget (using UWWC provided template)
“Agency name_2019_program budget”
- Most recent financial statement (P&L and Balance Sheet from most recent month)
“Agency name_2019_PL”
“Agency name_2019_Bal”