



United Way of
San Luis Obispo County

COMMUNITY IMPACT FUND

2020 FUNDING CRITERIA AND INSTRUCTIONS

Application Deadline: Friday, October 11, 2019 (11:59 p.m.) PST
Late or incomplete applications will not be considered for funding.

ACKNOWLEDGEMENTS

United Way of San Luis Obispo County is grateful for the many local and national companies who host annual Workplace Giving Programs, allowing us to gather support from thousands of individuals, and for the generous corporate donations we receive for the Community Impact Fund.



**THANK YOU
FOR YOUR SUPPORT**

MISSION STATEMENT

United Way of San Luis Obispo County's mission to foster structural change by addressing root causes in order to safeguard the future of our community.

Our vision is a strong, healthy, compassionate community that gives youth the foundation to thrive and succeed.

We are an independent nonprofit public benefit corporation governed by a board of local volunteers, affiliated by membership with United Way Worldwide but addressing local needs as determined by our local communities. We seek to highlight critical health and human service issues and to focus volunteer support and contributions where the need is greatest in our community.

CRITERIA FOR FUNDING

Through the Community Impact Fund, United Way of San Luis Obispo County supports programs, projects and activities in San Luis Obispo County offered by charitable organizations that have a current tax-exempt status from the Internal Revenue Service under Section 501(c)(3) and that have held this status for at least three years. Organizations that do not meet this criterion may seek a collaborative partner to serve as the lead agency or fiscal agent for a joint application.

United Way of San Luis Obispo County is committed to equal employment opportunity and nondiscriminatory service provision. In order to be eligible for funds from United Way's Community Impact Fund, agency programs receiving funds may not discriminate against recipients of program services because of race, ethnicity, religion, national origin, age, gender, sexual orientation, marital status, or physical and/or mental disability. The United Way Board of Directors will make the determination whether an agency complies with this policy. United Way further encourages agencies to adopt the broadest possible nondiscrimination policies in the interest of inclusiveness in services to the community.

Applicants must verify and demonstrate sound financial management, fiscal accountability and managerial and/or administrative competence. For specifics, see the Better Business Bureau Wise Giving Alliance Standards for Charity Accountability, <http://www.give.org/for-charities/How-We-Accredit-Charities/>.

Grants are awarded at the discretion of the United Way Board of Directors. Proposals for Community Impact Fund grant awards will be evaluated specifically on the following criteria:

- Addresses at least one of United Way's impact areas, Education, Health, Financial Stability, or Community Strengthening (page 4)
- Components of structural change (page 5)
- Has a positive impact on the community, producing clearly identified outcomes that contribute to the quality of life for SLO County residents
- Represents a clearly-defined and integral part of an organization's overall, coherent strategy for meeting a community need

- Leverages other resources from inside or outside the community – that is, uses current resources to generate or facilitate the generation of additional resources in the form of matching grants, in-kind donations, volunteers, etc.

United Way works in partnership with local agencies, businesses, service organizations, governments, and individuals to zero in on our community's most pressing needs. Through the generosity of local individual, business and employee donations, we have a limited amount of unrestricted funds available for local grant making.

EXCLUSIONS

United Way of San Luis Obispo County does not make Community Impact Fund grants to:

- Individuals
- Fraternal organizations, unless in support of a specific program open to or benefiting the entire community without regard to membership status
- Governmental organizations, unless part of a collaborative project with a community-based organization
- Fundraising events such as walk-a-thons, tournaments, fashion shows, auctions or dinners
- Endowment funds
- Scholarships (in which cash is given directly to an individual), fellowships, travel grants and technical or specialized research
- Pay off past debts or existing obligations
- Pay for capital (building) projects or improvements
- Organizations and programs designed to elect candidates to public office
- Organizations with religious or membership affiliations unless the program is open to the entire community without regard to religious beliefs or membership status
- Organizations located outside San Luis Obispo County unless for a specific program benefiting residents of – and conducted within – San Luis Obispo County

GRANT AWARD LIMITS

Applicants are encouraged to request a specific amount needed to produce the measurable outcomes described in the proposal (without requesting funds in excess of what is required), and to clearly break down the use of funds in the program's line-item budget.

Proposals may be made for any amount up to a maximum of **\$10,000 per program** in each of the community impact areas, education, health, financial stability, or community strengthening.

WHICH COMMUNITY IMPACT AREA DOES MY REQUEST ADDRESS?

In order to achieve the greatest results through its investment of the Community Impact Fund, United Way supports programs and activities in our major impact areas; Education, Health, Financial Stability and Community Strengthening. Through these initiatives, United Way of San Luis Obispo County and other local nonprofits are able to address the complexity of people's lives and local communities, making positive changes and increasing the quality of life for SLO County residents. We are working towards eliminating the root causes that perpetuate unacceptable health and human service conditions, creating pathways to lasting community change.

**EDUCATION**

Childhood and youth success is the cornerstone of individual and community success. These programs promote a well-rounded education and provide necessary tools for youth to reach their potential and develop the skills needed to become active participants in the community.

**FINANCIAL STABILITY**

Improved economic mobility helps families, individuals and youth with limited resources achieve and maintain their independence and supporting services that foster self-sufficiency and long-term stability.

**HEALTH**

Programs advocating for healthy lifestyle choices and ensuring access for community residents to primary and preventive health care, education and services to attain physical and mental well-being.

**COMMUNITY STRENGTHENING**

By increasing the quantity, quality, or efficiency of the services, operations or capacity of a nonprofit organization, enhancing collaborations in which two or more agencies achieve shared positive outcomes, or encouraging community volunteerism, we build capacity to advance the Common Good.

Applications are evaluated competitively within the four defined impact areas. *For example, a job-skills mentoring program for high school youth may be evaluated alongside reading literacy programs in the "Education" impact area, or alongside vocational employment programs in the "Financial Stability" impact area.* For additional resources to determine which impact area is an appropriate fit, consider which outcome indicators in the Logic Model section measures the success of the program.

HOW DOES A PROGRAM INCORPORATE COMPONENTS OF STRUCTURAL CHANGE?

United Way of San Luis Obispo County believes it is important to improve the lives of those in our community by focusing on learning and personal growth, thereby helping them help themselves.

Structural change strategies are designed to address and eliminate the causes of the social problems that exist within the community or within the individual; they are often collective and/or require legal action be taken to eliminate barriers related to issues of race, class, gender, age, ability, sexual orientation, etc. For example, implementing an early warning and intervention system for primary grade students to identify children struggling with reading, encouraging banks to change policies that make it hard for low-income individuals to open accounts (such as a minimum account balance), or increasing public awareness and education about prenatal exposure to tobacco, alcohol or other harmful substances.

United Way of San Luis Obispo County is committed to identifying and solving the underlying causes of problems or issues, so that our community will experience long lasting, systemic change.

LOGIC MODEL

INPUTS, ACTIVITIES AND OUTPUTS

Measuring program outcomes is an important part of helping analyze and explain the impact nonprofit agencies are having in the community. The data can help increase accountability to donors, enhance marketing, fundraising messages, and visibility in the community, and promote success in retaining or increasing fundraising dollars. The following definitions should be used when completing the logic model section of the application.

INPUTS	ACTIVITIES	OUTPUTS
<p>Resources a program uses to support activities and achieve program outcomes.</p> <p>Example:</p> <ul style="list-style-type: none"> - Staff and volunteers - Facilities - Equipment and curricula 	<p>What a program does with its inputs; the services it provides to achieve outcomes.</p> <p>Example:</p> <ul style="list-style-type: none"> - Healthcare for families - Educating the public about signs of child abuse - Providing adult mentors for youth 	<p>Products of a program's activities which produce desired outcomes for the program's participants.</p> <p>Example:</p> <ul style="list-style-type: none"> - Meals provided - Classes taught - Brochures distributed - Participants served

Using the form: Click on the “+” to add each input, activity or output. Select “Save and Add New” to add additional inputs, activities or outputs, or “Save and Exit” to return to the logic model homepage.

Competitive grant applications will include at least one of these outputs:

Education

- Number of children (0-5) enrolled in high-quality early childhood programs
- Number of children served receiving literacy supports in K-6
- Number of families/caregivers served that are provided with information, resources, tools, trainings, and/or teaching skills
- Number of elementary/middle/high school youth served who participate in school and/or community-based out-of-school time programs and/or receive individualized supports
- Number of youth served who receive job skills training

Financial Stability

- Number of individuals served who receive job skills training
- Number of individuals served who access affordable housing, financial products, and services (that help them build savings to deal with unexpected expenses and accumulate assets to support longer-term goals.)

Health

- Number of individuals participating in physical activity, healthy food access or nutrition programs
- Number of individuals served with access to healthcare services
- Number of individuals served with access to healthcare insurance
- Number of individuals participating in social-emotional activity or programs

Community Strengthening

- Number of volunteers
- Number of volunteer hours
- Number of opportunities for volunteers to meet community needs
- Number of individuals who received a referral for health and human services information

INDICATOR MEASUREMENTS AND TARGETS

Targets are measurement predictions for a program's level of achievement of its outcomes. The number and percent of program participants who demonstrate these behaviors is an indicator of how well the program is doing with respect to the outcome.

OUTCOMES
<p>What the program participants achieve; benefits for participants during their involvement with a program during this funding cycle. Outcomes may relate to knowledge, skills, attitudes, values, behavior, condition, or status.</p> <p>Example:</p> <ul style="list-style-type: none"> - Student reading at or above grade level. - Individual earns a job-relevant certificate. - Family adopts health behaviors.

In the space provided, enter the number of clients who will be served by your program, and the number of clients that you predict will achieve the stated outcome. The system will compute the percentage of clients who are expected to achieve the outcome.

General measurement tools have been provided. Describe your data collection method in the space provided for applicable data collection methods. Each outcome does not require a separate measurement tool. (For example, one survey may be used to measure multiple attributes or behaviors.)

Example:

- Survey that measures academic performance
- Number of rent payments made to provide a family with affordable housing
- Log of hours client engaged in physical activity

Using the form: Select “Save and Add New” to add additional outcomes, or “Save and Exit” to return to the logic model homepage. To return to the dashboard, click the “Application” link above the logic model.

Please select at least one of the following Outcome Indicators:**Education**

- Percent of children (0-5) served who achieve developmental milestones (literacy, social, emotional and intellectual)
- Percent of children (K-6) served who are proficient on school readiness assessments
- Percent of children (K-6) served reading at or above grade level
- Percent of children (K-6) served who maintain satisfactory or improve school attendance
- Percent of youth served who graduate high school on time
- Percent of youth served who gain post-secondary employment, further education, or credentials
- Percent of middle/ high school youth served who earn passing grades in core subject areas
- Percent of elementary/middle/high school youth served who maintain satisfactory or improve school attendance
- Percent of middle/high school youth served who develop soft skills
- Percent of youth who transition from middle to high school on time

Financial Stability

- Percent of individuals served who obtain and retain employment that pays a living wage
- Percent of individuals served who increase their wages
- Percent of individuals served who increase their disposable income by accessing benefits and/or reducing their costs
- Percent of clients who receive refunds through VITA
- Percent of individuals served who earn job-relevant licenses, certificates, and/or credentials
- Percent of clients who gain knowledge of financial literacy concepts

Health

- Percent of children/adults served who adopt a healthy behavior
- Percent of children/adults served who achieve a healthy weight
- Percent of babies served born at a healthy weight
- Percent of mothers served who access prenatal care

Community Strengthening

- Percent of individuals provided with increased quantity, quality, or efficiency of the services, operations or capacity of the organization
- Percent of clients who accessed a referrals for health and human services information
- Percent of individuals engaged in opportunities for volunteers to meet community needs
- Percent of individuals who increased charitable giving

Using the form: Click on the "+" to add each outcome. Select an outcome indicator from the drop down menu. Select all that apply. Select "Other" from the drop down menu and use the space provided to describe any additional outcomes you will measure.

PROGRAM BUDGET WORKSHEET

Download the excel file labeled “Program Budget” by clicking on the link.

Using the excel template provided, list expense items for the program identified in your proposal, **not** your organization’s total budget. The total in Column A (in this example, \$3,500) is the total amount your proposal is requesting from United Way.

<i>Expense Item</i>	<i>Amount Requested from UW “A”</i>	<i>Amount from Other Source(s) “B”</i>	<i>Total “A” + “B”</i>
Salaries	\$500	\$19,500	\$20,000
Taxes		3,000	3,000
Equipment	1,000		1,000
Telephone		500	500
Rent		3,000	3,000
Office Supplies		300	300
Printing		400	400
Consultant	1,500		1,500
Training	500	500	1,000
Postage		100	100
Mileage		800	800
Misc. Supplies		200	200
Other		200	200
Totals	\$3,500	\$28,500	\$32,000

List other sources of support for the program identified in your proposal, **not** all sources of support for your organization.

<i>Source</i>	<i>Amount</i>
Contracts	\$10,000
Donations	3,500
Fundraising (for example: special events, campaigns)	7,000
Grant from Other Source	1,000
Grant from Other Source	2,000
Program or Membership Fees	4,000
Other	1,000
UW Community Impact Fund Grant (as requested)	\$3,500
Total Anticipated Program Support	\$32,000

The total of columns “A” and “B” in in the Program Budget table should equal the Total Anticipated Program Support “C” amount in the table.

Use the “browse” button to upload your completed worksheet file

PROPOSAL FORMAT AND INSTRUCTIONS

Applications will only be accepted via United Way of San Luis Obispo County's online grants management portal, unitedwayslo.communityforce.com. If this is your first time using the website, select "Login" and follow the on screen instructions for New Applicants.

Please save frequently. The time-out period for Community Force software is 20 minutes.

If multiple individuals will be collaborating on a single application, each person should create a unique user account. Once you have begun the application, you may use the "Add Collaborator" button to grant access to additional users.

Please submit separate applications for each program for which you are seeking funds. **Applications must be submitted no later than 11:59 p.m. on Friday, October 11, 2019.** Late or incomplete applications will not be considered for funding.

Answers to frequently asked questions about using the software can be found online at <http://support.communityforce.com/faq/faq/applicant/>. Please review this tool prior to contacting United Way staff.

Upon request, United Way staff will confirm submission of a complete application submitted prior to 4:00 PM on Thursday, October 10, 2019. United Way staff will not upload any documents or make changes for the applicant.

REVIEW AND FUNDING CYCLE

Funding decisions are made through a rigorous community volunteer process that insures accountability and capacity for delivery and that encourages community problem-solving innovation.

Site visits may be conducted by United Way volunteers during the grant review process.

Also during this time, additional information may be requested of the agency at the discretion of United Way volunteers or staff. This may include a current list of Board of Directors, most recent 12-Month Fiscal Year Balance Sheet and Profit & Loss Statement, Year-to-Date Current Period Balance Sheet and Profit & Loss Statement, current operating budget, IRS Tax Exempt Status Letter, and/or IRS Form 990.

Notification of funding will be made on or around December 9, 2019. Grants are made for a period of twelve months, beginning January 1, 2020.

REPORTING REQUIREMENTS

Successful grantees will be required to provide reports detailing how the funds are used and reporting the measurable outputs, outcomes, indicators and targets for the program, twice during the year. If written materials are produced using Community Impact grant funds, sample document(s) should also be submitted. Late or incomplete reports may jeopardize subsequent grant payments or future applications for funding.

Successful grantees will also be asked to publicly acknowledge funding in support of your program(s) provided by United Way of San Luis Obispo County. Examples: Website and social media. Please include screenshots of website and social media posts in your grant reports. A United Way of SLO County logo will be emailed to you upon request.

All applicants selected for funding will also be required to actively update 2-1-1 SLO County with their current programs, hours of service, and any other details pertinent to their agency's acceptance of referrals. Applicants can review their current listings or request an update online at 211slo.org.

Agencies which utilize volunteers will be asked to register for a VolunteerSLO.org agency account, designate at least one staff member to complete Get Connected Agency Training, and promote the agency's volunteer opportunities on VolunteerSLO.org. Applicants can review and update their current volunteer listings online at www.VolunteerSLO.org.

ADDITIONAL RESOURCES

Proposal Questions

For information about grant narrative and logic models contact Linda Wingert at lwingert@unitedwayslo.org.

If you have additional questions about the application process, funding criteria and eligibility, or which impact area your program would be best suited, please contact United Way of San Luis Obispo County staff at (805) 541-1234.