UNITED WAY OF METROPOLITAN DALLAS

2022-2025 COMMUNITY IMPACT GRANT RFP ORIENTATION
GENERAL INFORMATION

• If you have questions during the orientation, please submit them using the chat function.

• We have a dedicated time near the end to address questions, but we may not be able to address all questions and will follow up after the session as needed.

• A copy of the presentation and a compilation of all questions submitted/the responses will be provided on our website after the last orientation on January 18th.

• Please have a copy of the RFP available to reference today during the orientation.
AGENDA

• Community Impact Grant (CIG) Process & Timeline
• Stewardship
• Survey Monkey Apply Grant System
• Review the Application
• Site Visits
• Questions and Answers
• Closing
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COMMUNITY IMPACT GRANT (CIG) PROCESS & TIMELINE
GENERAL ELIGIBILITY REQUIREMENTS

1. The organization must be a 501(c)(3) or have a fiscal sponsor that is a 501(c)(3).

2. The proposed program must concentrate its efforts and services within the United Way of Metropolitan Dallas service area (Dallas, Collin, Southern Denton, and Rockwall counties).

3. The program must align with driving impact in our Aspire 2030 goals. Competitive applicants will address at least one Impact Area – Education, Income, and Health and the associated Community Indices/Common Measures.

4. The applying organizations must pass the requirements of the Stewardship Report.

5. UWMD does not fund capital campaigns or scholarship programs and will not fund programs focused on evangelism.
TIMELINE

- **RFP Released**: January 10, 2022
- **RFP Due**: February 11, 2022
- **UWMD Staff and Volunteer Review**: February and March
- **Yes or No Site Visit Notification**: Early April
- **Site Visits**: Mid-April to Mid-May
- **Funding Decisions**: Mid-June
OUR COMMUNITY’S ASPIRE UNITED 2030 GOALS

LEARN UNITED
Increase by 50% the number of students reading on grade level by third grade. Double the achievement rate for Black and Latinx students to close the racial gap.

EARN UNITED
Increase by 20% the number of young adults who earn a living wage, adding nearly $800M in wages per year in North Texas.

THRIVE UNITED
Increase to 96% the number of North Texans with access to affordable health care insurance.
• Refer to pages 6-8 for more details about UWMD’s Community Indices and the types of programming that aligns with each Community Index.
• UWMD has a continuing focus to fund applications that provide services in our Priority Geographic Areas

• UWMD worked with our evaluation partner PCCI to identify zip codes in each county of our service area that are defined as our Priority Geographic Areas

• UWMD has set percentage funding goals in 5 categories using these Priority Geographic Areas and will categorize applications accordingly

• To view the Priority Geographic Areas and Funding Goals please reference pages 9-10 of the RFP
IMPORTANT APPLICATION INFORMATION

• Holistic Applications:

  UWMD has structured our grant process to allow for applicants to describe their full range of products and services that are provided to help improve a client’s situation, demonstrating a holistic vision for the target client population.

• Number of Applications Accepted:

  For their organization’s own programming, an organization can submit ONE APPLICATION. In addition to or instead of one application focused on their organization’s work, an organization can apply multiple times as either the fiscal sponsor for a collaboration or collective impact program or as part of a different collaboration or collective impact program.

• Unrestricted Grant Awards:

  In an effort to help applicants achieve their mission with greater effectiveness, all 2022–2025 Community Impact Grant awards will be unrestricted grants.
STEWARDSHIP
STEWARDSHIP - PURPOSE

• To assess the financial stability of an organization that is applying for a multi-year grant from United Way of Metropolitan Dallas

• Stewardship pertains to the entire organization, not just related to the services described in the application

• Stewardship reviews are completed in tandem with the evaluation of the programmatic information submitted in the application. An organization has to pass Stewardship to be considered for funding.

• Stewardship is completed annually for organizations that are awarded grant funding
• Independent Audit w/Management Letter*
• Form 990 OR Form 990 EZ
• Board of Director Roster
• Unaudited Financial Statements
• IRS Determination Letter
• Patriot Act Compliance
• Disclosures
STEWARDSHIP – INDEPENDENT AUDIT

- There are four levels of evaluation that can be done by a CPA:
  - Audit
  - Review
  - Compilation
  - Financial Statement Preparation

- For most organizations UWMD requires an Audit, which is the most thorough and the CPA is required to be independent of the organization.

- The Independent Audit Year End must be no older than 24 months from the application due date.

- NEW EXCEPTION: If an organization’s Gross Annual Budget (Line 12 of Form 990 Tax Return) does not exceed $750,000 then no independent audit is required from that organization.
If the most recent audit had a management letter (also known as internal control deficiency letter) with it, please submit a copy of that management letter.

What is a management letter?

- Most audits will not have a management letter. If your organization does not have one, then there is nothing to submit for Stewardship.
- Letter from the auditor generally addressed to the Board of Directors that address issues found during the audit.
- Not the cover letter for the Independent Audit report.
- Not the letter that organization leadership provides to the auditor during the audit.

If your organization’s audit has a management letter, please provide a response from your organization’s leadership that details how the issues identified in the management letter are being addressed.
STEWARDSHIP – TAX RETURN

• Form 990 or Form 990EZ required
• Form 990-N (postcard return) **does not meet the requirement**
• The Form 990 Year End must be no older than 24 months from the due date

**EXCEPTIONS:**
• If your organization is a church or other house of worship that is not required by the IRS to file a return. This exception does not apply to general faith-based nonprofit organizations
• A state institution or governmental unit that is not required by the IRS to file a tax return.
• Current roster of Board of Directors

• Include which committees a Board Member is a part of (executive or other standing committees)

• Please include the demographic information asked for

• Format of the document can vary
STEWARDSHIP – UNAUDITED FINANCIAL STATEMENTS

• Most recent 3 months of financial statements from the due date of the report:
  • Example: The due date is February 11, 2022, then the financial statements would need to be no later than October of 2021
  • Includes a Statement of Financial Position (Balance Sheet)
  • Includes a Statement of Activities (Financial Stability Statement)
STEWARDSHIP – IRS DETERMINATION LETTER & PATRIOT ACT COMPLIANCE

• Upload either your organization’s IRS Determination Letter or the IRS Determination Letter if your organization has a fiscal sponsor

• Complete Patriot Act Compliance Information
Disclosures are adverse changes in or threats to the financial health, status, and outlook of your organization.

Disclosures could include:

- Recent changes in organizational leadership
- Change in governance
- Adverse public relations events or occurrences
- Fraud or criminal activity relating to your organization
- Litigation relating to your organization
- Threatened or ongoing investigations
If you have questions about the Stewardship portion of the application, please contact

Mark Pollack
mpollack@unitedwaydallas.org
• If you already have an account, you can select Log In at the top right

• Or you can create a new account

• When creating a new account, you should receive the message almost immediately and should check junk mail if needed

• Account creation requires a confirmation via email
• Use the “Programs” Page to first access and create the application

• Once application is created use the “My Applications” to see your active Community Impact Grant
The Survey Monkey Apply grant system allows for multiple individuals to have read or read/write access to an active application.

The account owner will create an application and can then invite other individuals as needed.

Once an application is created, you’ll see the option to add a collaborator to the application.

Click Add collaborator, enter their email addresses, select the access they will have and select “SEND INVITE”.

Recipients should receive the message almost immediately and should check junk mail if needed.
• Each task at the right is part of the application. As they are completed green check marks will appear.

• Once all required sections are “Marked as Complete” the “Review” and “Submit” buttons at top left become active.

• Clicking “Submit” will submit the full application.
• Help Desk is available from Survey Monkey Apply when logged in to an existing account or when creating an account:
SURVEY MONKEY APPLY – TIPS

• Primary account “owner” has to be the person to actually submit the application
  • Especially important if you have a team or are submitting a collective impact/collaboration application

• To skip to different portions of the application click on the tasks listed on the application home screen

• To download the entire application, select the three dots at the top right and select the “Download” option

• Mark each section as complete and then hit the submit button.

• Look for email confirming that the application was actually submitted

• Submitting an application 30 minutes before the deadline is a risky idea
REVIEW THE APPLICATION
Questions 1-9 are for basic organization contact information

Question 10 is to provide your organization’s mission statement

Questions 11-16 ask for staff contact information in different areas of the organization’s work

*If you are applying as for a collaboration or collective impact program, please enter the basic organization and staff information for the lead organization*

*Page 20 of the RFP*
RFP QUESTIONS

Question 17: Anti-Discrimination Statement

- Affirm statement or enter requested information

Question 18: Program Name

- Use an existing name or create a program name

Question 19: Program Summary

- Brief program summary. Used to describe your program online and in UWMD documents
Question 20: Select Impact Areas – Education, Income, Health

- You must select at least one Impact Area, but can select multiple as long as your program aligns with those Impact Areas
RFP QUESTIONS

Question 21: Geographic Area Served

- Describe the geographic area where the services described in this application are provided.
RFP QUESTIONS

Question 22: Zip Codes

- Enter up to five zip codes in descending order with the zip code where the highest number of clients receiving services described in the application reside listed first.

- Can enter less than 5 zip codes if services are geographically concentrated.

- Only provide zip codes from the four counties of UWMD's service area.

- If you do not track client residence zip code, then leave them blank and select the unknown option.
Question 22a: Known Zip Code

- Enter the percentage of clients served by the services described in this application that have a known zip code.

- Responses could be 100% if every client provides a zip code, a percentage less than 100% but greater than 0% if some client residence zip codes are known, but others are not, or could be 0% if this information isn’t tracked at all.
Question 23: Annual Grant Request Amount

- This needs to be the **annual dollar amount**. The amount will be the same each year over the course of the three-year grant. It is not the aggregate amount.

- The maximum grant award is $500,000 annually and the minimum grant award is $30,000 annually.
Question 24: Statement of Needs

- Describe the population being served and the needs that the target population faces
- Share quantitative and qualitative data specific to the needs of the target population you serve
- Can include sources but use simple references
- Share data as localized as possible to the clients you serve (for example zip code or city statistics vs. national statistics)
Question 25: Program Plan

- Include description of program activities

- Description should be fairly detailed and describe the program so that a reviewer of the application with no previous knowledge of these services can understand how it works

- If the application is a collaboration or collective impact program, please describe the procedures and processes in place to facilitate work between the different partners.
Question 26: Client Flow

- Provide a description of the client experience with the services described in the application
- Can include specific dates, timelines, milestones, etc.

Client Flow Optional Upload

- Have the ability to upload an optional flow chart if you feel that would help reviewers understand how the program operates
- Document can display the response in a visual manner. Does not need to be fancy and the system accepts a variety of file types
Question 27: Applying Organization and Community Interaction

- Describe how individuals and communities most impacted by the issue(s) that your organization seeks to address have been involved in defining issues, developing proposed strategies and solutions, and making organizational decisions.

Question 28: Organization and Community Demographics

- Describe how the demographics of your organization’s staff, board, and volunteers (as applicable) reflect the demographics of the population(s) you serve and the demographics of the broader community in your service area.
RFP QUESTIONS

Question 29: Racial Equity Education/Training

• Share any efforts that your organization is currently implementing or planning to implement in order to increase the diversity of board, staff, and volunteers, to provide racial equity education, or to provide racial equity training.
RFP QUESTIONS

Question 30: Organization Budget

- Upload the organization’s budget
- Budget should be the current Board-approved budget
- Should have a comparison to the previous year and provide current year-to-date actual revenues and expenditures

There is no longer any program specific budget as part of the Community Impact Grant application
Question 31: Organization Budget Narrative

- Space to explain any part of the uploaded organization budget
- This could include significant budget variances
- Could also include if an awarded grant would be used as a match grant
- This is a question that is “required” in the grant system, but if you have no additional explanation needed or significant budget variances to explain you can enter “Not Applicable”
Unduplicated Clients

- Ask for an Actual, Estimated, and Funding Year 1 and the dates are provided.

  Please note that Funding Year 1 is only 11 months as we adjust our reporting cycle for this grant cycle

- The totals of each section should match across all five sections (use the unknown row if needed)

- Remember that this is for unduplicated clients. Clients that receive multiple services should only be counted one time
Common Measures:

- When completing this section please reference the document titled “Social Services Common Measures Framework: Standards of Measure and Practice”

- This document which is linked in the application and available on our website provides more information about each measure, some verification methods for the measure, and some examples of measurement timing.

- Each application needs to select at least one common measure (which should align with one of the Impact Areas selected earlier in the application)

- Applicants should select common measures that align with the services described in the application and common measures selected can cross all Impact Areas
Common Measures:

- There is no maximum, but be realistic about the measures you select as you’ll be reporting on them for the grant period, and they need to be relevant to the services you describe in the application.

- Common measures are asked for 5 years. Last Year, Current Year, and Projections for each year of the Community Impact Grant.

- If the measure was not tracked Last Year or in the Current Year you can enter 0 in those columns and then provide a response for the Year 1, Year 2, and Year 3 columns.
Scoring Rubric:

- The scoring rubric that will be used by our grant reviewers is on pages 49-51.
- The scoring rubric provides the scoring weight of each section and may help guide where you spend time working on the application.
SITE VISITS
SITE VISIT PURPOSE

• As of today, we are planning for site visits to be combo in-person and virtual with some attendees participating in either manner.

• Opportunity for volunteer/staff panel to gain a deeper understanding of the services described in the application.

• UWMD may send questions in advance, so site visit is the opportunity to respond to those questions.

• It is recommended for a variety of staff to attend to help present materials and address questions.

• Consider including front-line program staff that actually provide services be a part of the presentation as they are often most effective in communicating the work or addressing questions.
SITE VISIT SCHEDULE

- Site Visits occur on Tuesday Morning & Afternoon, Wednesday Morning & Afternoon, Thursday Morning & Afternoon, and Friday Morning

- They occur during “normal” business hours of 8:30 – 5:00pm

- The application allows you to share if there are times your organization would not be available to host a site visit (ex. during school day dismissal, meal service, etc.)

- Site visits can be held at your location or at the UWMD office

- There is a section of the application that asks questions related to the site visit so provide responses there
SITE VISIT LOGISTICS

- Expect 6-15 attendees (volunteers and UWMD staff)
- In-person attendees would appreciate a space to sit and write/type
- Site Visits will be 45 minutes:
  - Generally, 25 minutes for a presentation from applicant followed by 20 minutes for questions from the volunteers and staff
- More details about Site Visit content will be shared should your application be selected for a site visit
• Please submit questions using the chat feature of the Zoom meeting

• We will do our best to answer questions of general interest during this session

• Some questions may require individual follow up from staff

• If you have agency specific type questions, please reach out separately to our staff team

• We will track the questions and responses from each session and provide a document that provides a response to the questions from each session so all applicants can see the same responses. It will be found online at https://unitedwaydallas.org/nonprofits/
CLOSING
NEXT STEPS

• Create an account in or login to an existing account in Survey Monkey Apply to start the application

• Visit [https://unitedwaydallas.org/nonprofits/](https://unitedwaydallas.org/nonprofits/) for copies of the RFP, Standards of Measures document, orientation presentation*, and questions from orientation sessions*

• **Applications are due online by 5:00 pm on Friday, February 11th**

*These documents will be provided after last orientation session on January 18th*
THANK YOU