

# Request for Proposal Workshop



# Agenda

- Welcome
- Grantmaking Approach
- What's Different This Year?
- Community Investment Areas
- Proposal Highlights + Method of Submission
- Selection Criteria
- Proposal Review
- Demographic Data
- Key Dates + Deadlines
- Next Steps

# Agenda slide

- Name, title – delighted to be apart of this grantmaking effort to strengthen our NP community
- Grateful to have you all here today and thank you for this opportunity to convene and discuss the upcoming Impact 100 application process
- Because of the generosity and investment from individual like yourselves and others in the community as well as corporate and civic donors, the Impact 100 grants are made possible. I thank some of you in this room for your contributions and efforts with your organizations' campaigns.
- Session today
  - Create space for those considering the apply to learn about the process but importantly ask those questions that may be on your mind.
  - Agenda is designed to be thoughtful and efficient plus will be around this afternoon plus hold office hours for additional questions
- Important piece – United Way of Greater Kansas City will grant 100 awards
  - When you do the math of the 11000+ NP in KC, we will not be able to grant awards to all of your deserving and worthwhile organizations
  - Lack of selection is not an indictment of your organization
- The process is competitive but also bear in mind, we are operating the selection process to be equitable and proportionally distributed across a six-county region

# UNITED WAY OF GREATER KANSAS CITY

## COMMUNITY IMPACT TEAM



**PRECIOUS  
STARGELL**  
CHIEF IMPACT OFFICER  
CUSHMAN



**JIM  
MACDONALD**  
VICE PRESIDENT  
COMMUNITY IMPACT



**TODD JORDAN,**  
VP, COMMUNITY IMPACT,  
EXECUTIVE DIRECTOR OF 211  
PHD



**KAREN  
GETTINGER**  
DIRECTOR, COMMUNITY  
IMPACT



**ESSENCE  
YANCEY**  
DIRECTOR, COMMUNITY  
IMPACT



**KRISTEN ENGELBRECHT**  
DIRECTOR, 211  
ANDRES



**CHAD GRAND**  
MANAGER, COMMUNITY  
IMPACT



**AMY HAAS**  
COORDINATOR,  
COMMUNITY IMPACT



**JOLANTA LIU**  
DIRECTOR, GRANTS &  
DEVELOPMENT OPERATIONS

FOR  
US  
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# CI Team slide

- This is our team and we'll be leading this effort this year along with 100 community volunteers.
- Chief among the team with more direct engagement are Jim McDonald, Karen Gettinger, Amy Haas and myself.



# Grantmaking Approach

- Trust-based philanthropic approach
- One-year, unrestricted grant in support of your organization's mission
- Low barrier application – max 3-page application
- No budget forms
- Minimal post-grant reporting
- Broad-based alignment with United Way's health and human service mission
  - Community Needs Index key reference point
- Inclusion in United Way's network
  - Exposure to corporate partners & individual donors
  - Participation in engagement opportunities
- No administrative fee on donor-directed gifts

# Grantmaking Approach Slide

- Utilized the principals of trust-based philanthropy
  - What this means is that we will provide one-year, unrestricted grant in support of your organization's mission – we are funding your organization not necessarily programs. Your organization will be in best decision to determine how to best use those funds.
- As such, we want the application process to be low barrier and as streamless as possible
  - Only 12 questions
  - Max 3-page application
  - No budget forms
  - Minimal post-grant reporting
  - Will support a broad focus of agencies aligned within health and human services – CNI
- Awarded organizations will gain exposure to United Way's corporate partners & individual donors
  - UW will also showcase your organization with various engagement opportunities
- Lastly, all donor –directed dollars to your organization come at 100% - No administrative fee



# What is different this year?

- 1) Participant data in aggregate (all programs) vs. program level
- 2) Streamlined service categories 21 > 12
- 3) Shortened the narrative section 4 > 3
- 4) Heightened focus on equity, inclusion and access to services
- 5) Expanded number of applicant reviewers
- 6) Focus on most significant programs – only 5
- 7) Reducing service categories – only 2 per program



# What is different this year?

- Personally, I am very excited about this grant opportunity – why?
  - Get to learn more about your organization and meet new organizations for the first time.
  - Thrilled to be apart of this process with all of you
- Team have been very conscientious in refining and streamlining this process based upon going into our 3<sup>rd</sup> grant year – taken your feedback and wanted to make some thoughtful changes – I will hit on a few but the team will go into greater detail
  - 1) Trust based funding for the entire organization lead us to focus on participant data across the organization and mor limiting to just programs
  - 2) Instead of 21 service categories we were able to consolidate to 12 without eliminating any focal areas
  - 3) Shortened the narrative section 4 pages – we know you are busy and that you can tell your stories and impact efficiently and effectively
  - 4) Heightened focus on equity, inclusion and access to services – building upon the need for a more inclusive community for all
  - 5) Expanded number of applicant reviewers – 100 community volunteers for additional exposure to your organiations
  - 6) Ask that you focus on the most significant programs – no more than 5
  - 7) And, reduce the service categories to only 2 per program



# Community Investments Areas

United Way of Greater Kansas City invests in a wide range of health and human services – ***Community Needs Index*** offer additional insights

- Access to Healthcare and Supportive Services
- Aging and Senior Support Services
- Behavioral Health and Substance Abuse Intervention & Treatment
- Child Welfare
- Community and Family Violence Prevention and Intervention
- Early Childhood Education and Development
- Financial Stability and Employment
- Food and Nutrition Security
- Housing Security
- Services for Individuals with Disabilities
- Supports for People with Involvement in the Justice System
- Youth Development, K-12 Academic Supports and Postsecondary Pathway

# Community Investments Areas

- United Way of Greater Kansas City will invest in a wide range of health and human services organizations across health, education and financial stability – 12 categories below
- If we want to follow along with me, please review pg 2 of your document entitle UW program categories
- Access to Healthcare and Supportive Services
- Aging and Senior Support Services
- Behavioral Health and Substance Abuse Intervention & Treatment
- Child Welfare
- Community and Family Violence Prevention and Intervention
- Early Childhood Education and Development
- Financial Stability and Employment
- Food and Nutrition Security
- Housing Security
- Services for Individuals with Disabilities
- Supports for People with Involvement in the Justice System
- Youth Development, K-12 Academic Supports and Postsecondary Pathway

Equally, please review the CNI for insights into how your organization's work aligns with UW's focus



# Not Funded Organization Types

- Animal welfare organizations
- Environmental organizations that do not have a human service, socioeconomic or racial equity focus
- Museums, arts and cultural organizations
- Entrepreneurship or small business, without a primary focus on low/moderate-income or disenfranchised populations
- Medical research organizations that do not provide direct healthcare services
- Journalism, news reporting and media organizations
- Organizations whose primary focus is grantmaking
- Schools—both K-12 district, charter, and private schools, as well as colleges and universities
- Religious organizations, except those offering health and human service programming that does not include religious content, limit services to those of a certain faith, or require participation in religious or spiritual activities

# Not Funded Organization Types

Equally, it is only fair to know the types of organizations that all OUTSIDE of our core health and human services focus and therefore not funded as part of our Impact 100 grant awards.

**This is does not diminish the incredible work being done in these areas, they simply fall outside of our focus**

Again, for ease of reference they are located on p3.

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# Selection Criteria – Organizational

- Track record of service to the community
- Mission aligned with United Way's pillars of investment in the community
- Demonstrated understanding of the community needs
- Program design supporting participant outcomes
- Track record of high degree of organizational accountability
- Demonstrated commitment to equity and inclusion
- Clearly defined, credible and effective role within the human service ecosystem

# Selection Criteria –

## Organizational (p.3)

As I touch upon before briefly, the United Way of Greater KC uses 2 sets of criteria in the selection process: 1) looks to the merits of the individual organization and 2) considers the composition of the overall grantees across a six-county region.

### **At the organizational level this is where you would tell your story**

- Track record of service to the community
- Make sure your mission is aligned with United Way's investment pillars
- Demonstrate how your organization is addressing community needs and the unique factors that affect your target population
- Outline how your programs are designed to support participant outcomes
- Highlight our organizations' track record of holding high standards of organizational accountability and transparency
- Explain how you demonstrated your commitment to equity and inclusion
- Lastly, Clearly define your credible and effective role within the human service ecosystem
  - **Use this section to really TELL your story, this is the area where you have the greatest influence**



# Selection Criteria – Ecosystem

- Investments in a wide variety of strategies and approaches
- Investments in a wide range of health and human service domains across Health, Education and Financial Stability.
- Investments within the six-county metropolitan area—Cass, Clay, Jackson and Platte Counties in Missouri, and Johnson and Wyandotte Counties in Kansas.
- Maximizing the impact of investments reaching as many lives as possible recognizing and balancing some organizations serving a small number of people making deep and lasting impact



# Selection Criteria – Ecosystem

(p.4)

In addition to assessing the individual applicant organization, UW will also be guided to ensure a broad base + inclusive portfolio of awards are granted across the six-county region.

- We will invest in a wide variety of **strategies** and **approaches** designed to improve our community – from immediate critical needs to preventative strategies
- We will make investments in a **wide range** of health and human **service** domains across Health, Education and Financial Stability
- We will invest within the six-county metropolitan area—Cass, Clay, Jackson and Platte Counties in Missouri, and Johnson and Wyandotte Counties in Kansas.
- **We are focused on maximizing the impact of these investments** by reaching as many lives as possible **YET recognizing and balancing some organizations may serve a small number of people making deep and lasting impact**



# IMPACT 100 GRANTS...

UNFORTUNATELY, NOT EVERY ORGANIZATION THAT ALIGNS WITH UNITED WAY'S INTEREST AREAS AND MEETS SELECTION CRITERIA WILL BE FUNDED.



# IMPACT 100 GRANTS...

HOWEVER, ORGANIZATIONS NOT SELECTED FOR THE IMPACT 100 WILL BE ELIGIBLE FOR DONOR-DIRECTED GIVING AND CONSIDERED PART OF UNITED WAY'S BROADER NETWORK OF COMMUNITY PARTNERS.



# PROPOSAL FORMS & METHOD OF SUBMISSION

JIM MACDONALD



# Proposal Highlights and Method of Submission

- **Proposal Narrative** – 3-page narrative
- **Participant Demographics Form** – report of the total number of people served by your entire organization broken down by demographic groups
- **Submission** - online United Way application portal
- **Unique link** - registered user(s) of your organization will receive a link to the application portal
  - Sharing the email and link within your organization is acceptable; due to uniqueness of the link, please do not share it with colleagues at other organizations
  - ***Advised - do not cut and paste into the online system***



# Proposal Narrative Overview

- Proposal Narrative – 12 questions
- Length— max. 3 pages
- Organizational Demographic Data
- Up to five programs overviews

Please use this opportunity to answer all questions completely. Opportunity to highlight and showcase your organization.



# Proposal Narrative – deep dive

1. Organization Name
2. Budget – Annual Operating Expenses  
(most recent FY)
3. Mission
4. Brief Organization Description



# Proposal Narrative – deep dive

5. Geographic Focus Area

6. Programs and Services

7. Role in the Human Service Ecosystem

8. Equity in Program Design and Delivery





# Proposal Narrative – deep dive

9. Accessibility to Services

10. Outcomes and Impact

11. People Served



# Proposal Narrative – deep dive

12. List below your organization's top five programs:

Program Name and Brief Description (up to 25 words)	Primary Program Category	Secondary Program Category (Optional)	Total People Served Last Year
Total Served Last Year:			



# Participant Demographic Data – deep dive

## Participant Demographic Data – Organization-Level Data Only

Report a count of program participants by geographic area, gender, race, ethnicity, income level and age group across all your organization's programs. Estimates are acceptable and, if an unduplicated count is not available, a duplicated count is acceptable. United Way is seeking an organizational view of client demographics and people served.

<b>Participants by County</b>	
<b>County/Geographic Area</b>	<b># Served Last Year</b>
Cass County	
Clay County	
Eastern Jackson County (Jackson <del>City</del> excluding KCMO)	
Johnson County (KS)	
Kansas City portion of Jackson County	
Platte County	
Wyandotte County	
Other Counties	
TOTAL	



# Participant Demographic Data – deep dive

Participants by Gender	# Served Last Year
Female	
Male	
Other	
Gender Unknown	
Total	

Participants by Race	# Served Last Year
American Indian/Alaska Native	
Asian	
Black/African American	
Native Hawaiian/Pacific Islander	
White	
Two or More Races	
Other	
Race Unknown	
Total	

Program Participants by Ethnicity	# Served Last Year
Hispanic, Latino/Latina, Spanish Origin	
Not Hispanic, Latino/Latina, Spanish Origin	
Total	

Participants by Income Level	# Served Last Year
Low Income	
Other Income Level	
Unknown	
Total	

Participants by Age Group	# Served Last Year
0-17	
18-64	
65+	
Unknown	
Total	

If the organization does not serve individual participants, rather than report data in the form above, describe the size and/or scale of the population(s) reached through the program through non-direct service strategies.

**NOTE:** In the online version of this form, you will also be asked to report the Race/Ethnicity of your organization's Chief Executive Officer.



# NEW APPLICANTS & NEXT STEPS

KAREN GETTINGER



# New Applicants Only

## **Intent to Apply Form & Eligibility Questionnaire**

- Required for all organizations who are not currently funded as Impact 100
- Eligibility determination made by November 29. Unique link provided via email

## **Certification Questionnaire**

Assists with applicant eligibility and assess adherence to organizational standards of accountability

- Reflects minimum organizational expectations of management and governance
- Assesses agency compliance with standards of accountability
- Protects the investments of United Way donor funds



# New Applicants Only

## Non-Profit Organizational Standard Documents

- IRS 501(c)3 determination letter
- Proof of corporate registration (certificate or screenshot from Secretary of State website)
- Attestation of nondiscrimination and/or diversity, equity and inclusion statement/policy
- Board of directors' roster
- Current year budget (summary budget suffices)
- Most recent IRS Form 990
- Most recent audited financial statements (or financial review), if available or most recent unaudited financial statements (income/expenses statement and balance sheet), if audit or is unavailable



# Summary - Fast Facts

- One proposal per organization – single, unrestricted grant will be awarded to the organization
- Proposal must be submitted through United Way's online application portal – do not share your link
- New applicants – complete Intent to Apply and certification form
- Only one demographic report per applicant (not one per program)
- Respond to all questions completely – tell your story
- Leverage Office Hours





# Next Steps

- New Applicants: Intent to Apply Deadline 5pm, November 15, 2023
- All agency applications are due Thursday, December 14, 2023
- Unique link online funding application
  - Current Impact 100 organizations – Thursday, 11/9
  - New/Currently not funded – Wednesday, 11/29 (after Intent to Apply review)
- Notification sent to all applicants by end of June



# TIMELINE

## CURRENT GRANTEES

October 31	RFP + application form template in website
Nov 6 8 13	Proposal Workshops
November 9	Access to application portal – unique email send to organization
December 14	Proposal Submission Deadline

## NEW APPLICANTS

October 31	RFP + application form template in website
Nov 6 8 13	Proposal Workshops
November 15	Intent to Apply Submission Due
November 29	Access to application portal – unique email send to organization
December 14	Proposal Submission Deadline



# Virtual Office Hours

**Wednesdays 1:00 p.m. – 2:00 p.m.**

November 8 through December 13

**Thursdays: 9:00 a.m. – 10:00 a.m.**

November 9 through December 14

Office Hours Zoom Link:

<https://us02web.zoom.us/j/84163491806?pwd=VTcwKzErQzVpMy9EbUFKMXZyVzZpZz09>

*\*No office hours provided on November 22 or November 23 due to Thanksgiving Holiday*



# Questions?

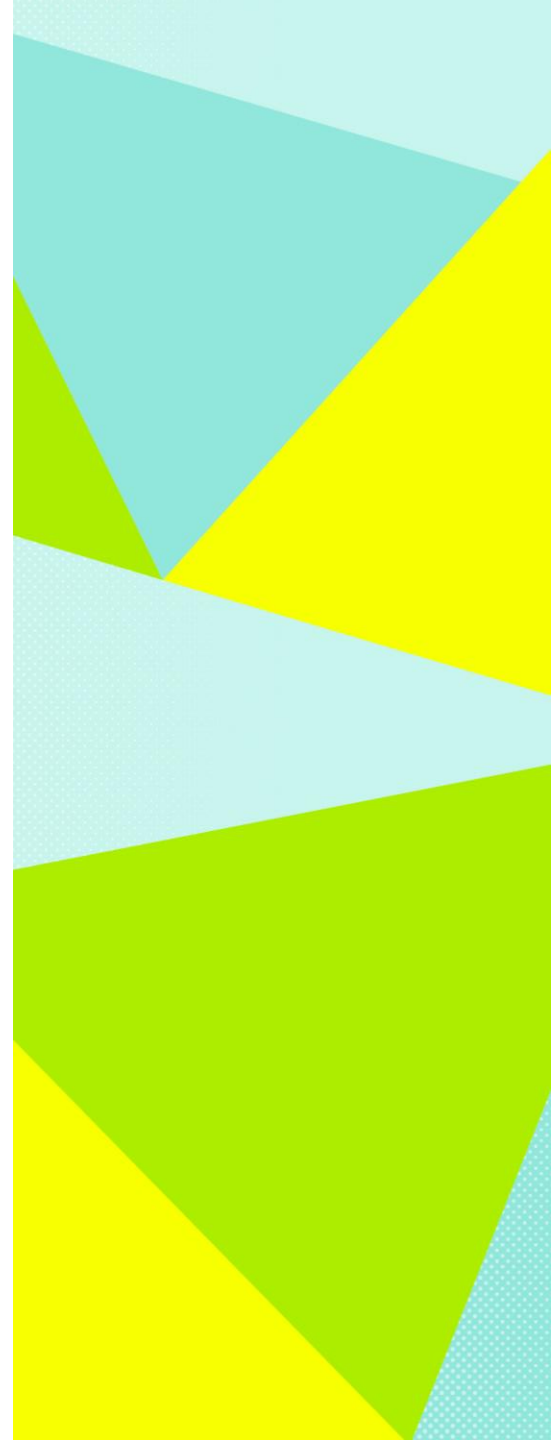
Online questions can be directed to:

[unitedwayproposalquestions@uwgkc.org](mailto:unitedwayproposalquestions@uwgkc.org)

Impact 100 content related questions, please contact:

Karen Gettinger [karen.gettinger@uwgkc.org](mailto:karen.gettinger@uwgkc.org)

Jim MacDonald [jim.macdonald@uwgkc.org](mailto:jim.macdonald@uwgkc.org)



**UNITED BY YOU**

