United Way of Southeast Louisiana
Collaborative Grant Application
Process Orientation

August 4 and 9, 2016
Today’s agenda

- Brief review of UWSELA’s Blueprint for Prosperity and new program grants (10 min)
- Collaborative granting process & documents (50 min)
- Q&A (30 min)
Our journey
engagement with partners and the community

TIMELINE OF THE JOURNEY TO IDENTIFY AND ADDRESS POVERTY

- Community conversations are held to understand the concerns and aspirations of SELA Residents
- Big Issue Meetings select poverty as root issue impeding continued progress in SELA
- Parish-level data gathering
- Thought Partner meetings determine vision, outcomes, and guiding principles

Date
- APR 2014
- JUN 2014
- NOV 2014
- FEB 2015
- SEPT 2015
- JAN 2016
# Blueprint overview

**a sharpened focus on eradicating poverty**

<table>
<thead>
<tr>
<th>MISSION</th>
<th>To increase the organized capacity of people to care for one another in order to create a stronger community for all</th>
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<tbody>
<tr>
<td>BIG GOAL</td>
<td>Eradicate POVERTY in Southeast Louisiana</td>
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<tr>
<td>VISION</td>
<td>Equitable communities where all individuals are healthy, educated, and economically stable</td>
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<tr>
<td>HIGH-LEVEL OUTCOMES</td>
<td><strong>PERSONAL WELLNESS</strong></td>
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<td><strong>STABILITY TODAY</strong></td>
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<td></td>
<td><strong>VIBRANT COMMUNITIES</strong></td>
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<tr>
<td>UWSELA STRATEGIES</td>
<td><img src="https://example.com/invest.png" alt="Invest" /></td>
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<tr>
<td>GUIDING PRINCIPLES</td>
<td>Connectivity</td>
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<td></td>
<td>Long-term commitment</td>
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</table>
Outcomes framework
what it will mean to achieve this vision

PERSONAL WELLNESS
People of all ages enjoy a high quality of life and wellbeing

STABILITY TODAY
All families have the skills, resources and opportunities to access basic needs

VIBRANT COMMUNITIES
All communities are safe, thriving, and equitable

PROSPERITY TOMORROW
All families have the social, educational, and financial assets to create a better future

Population-level indicators aligned with the outcomes framework are included in the grant guidelines appendix
### Guiding principles

**commitments to ourselves and partners**

<table>
<thead>
<tr>
<th><strong>CONNECTIVITY</strong></th>
<th>We coordinate our efforts to create pathways of prosperity that are trusted, culturally appropriate, accessible, and without bias.</th>
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<tbody>
<tr>
<td><strong>EQUITY</strong></td>
<td>We strive to lift up all people and to eliminate systemic barriers to prosperity.</td>
</tr>
<tr>
<td><strong>LIVED EXPERIENCE</strong></td>
<td>We amplify the voices of those we are serving and allow their needs and aspirations to guide our work.</td>
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<tr>
<td><strong>LONG-TERM COMMITMENT</strong></td>
<td>We commit to continuing our work until the cycle of poverty is broken, communities are thriving, and people are living prosperously.</td>
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<tr>
<td><strong>SHARED RESPONSIBILITY</strong></td>
<td>We believe success requires the unique contributions of the entire community, including individuals, families, schools, nonprofits, the faith-based community, funders, governments, and the private sector.</td>
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<tr>
<td><strong>SYSTEMS CHANGE</strong></td>
<td>We embrace our work as holistic and dynamic, impacting people, place, practice, and policy.</td>
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</table>
Prosperity strategy
bold shifts at UWSELA

INVEST
Expend resources in line with outcomes framework and guiding principles

INSPIRE
Encourage others to adopt the poverty eradication agenda

INFORM
Share knowledge and innovative practices

INITIATE
Create new collaborative efforts where there are gaps
Implications

what this means for UWSELA grantmaking

We are making two primary changes to our grantmaking approach:

1. Launching **Collaboration Grants**, designed to support groups of relevant stakeholders taking a collaborative approach to systems change

2. Aligning **Program Grants** with the new prosperity outcomes framework, population-level indicators, and guiding principles
   - Program Grants are UWSELA’s traditional funding stream, designed to support distinct programs or projects
Collaborative grants

_UWSELA is seeking proposals that:_

- Focus on one or more of our **four priority outcomes:**
  - **Stability Today:** All families have the skills, resources and opportunities to access basic needs
  - **Prosperity Tomorrow:** All families have the social, educational, and financial assets to create a better future
  - **Personal Wellness:** People of all ages enjoy a high quality of life and wellbeing
  - **Vibrant Communities:** All communities are safe, thriving, and equitable

- Contribute to at least one of our stated **indicators** related to poverty eradication

- Uphold the **guiding principles** for our work
Collaborative grants

**funding and eligibility**…

Collaboration grants are designed to support a group of organizations and actors taking a collaborative approach to systems change. Collaboration grants may be used for:

<table>
<thead>
<tr>
<th>Use</th>
<th>Description</th>
<th>Grant Size</th>
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<tr>
<td>Planning</td>
<td>Funding to help collaborations come together and create a steering committee, common agenda, and working groups</td>
<td>$25k</td>
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<tr>
<td>Infrastructure/Backbone</td>
<td>Funding to support backbone organizations and/or functions</td>
<td>$50k</td>
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<tr>
<td>Infrastructure/Shared Measurement</td>
<td>Funding to support shared measurement systems</td>
<td>$50k</td>
</tr>
<tr>
<td>Implementation</td>
<td>Funding to support system change strategies developed by working groups (e.g., policy/advocacy; spreading innovation and best practices across participating organizations; cross-organizational learning)</td>
<td>$100k</td>
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<tr>
<td>Continuous Improvement</td>
<td>Funding to help collaborations conduct evaluation</td>
<td>$50k</td>
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Collaborative grants
funding and eligibility

• Collaborations organized for primarily religious, educational institutions (schools/universities), fraternal, governmental, political, cultural, animal welfare purposes are not eligible for funding through UWSELA.

• Collaborations may include these organizations, but must have a fiscal agent that is a 501(c)3.

• Collaboration grants will not be awarded for endowment campaigns, land purchase, construction of new facilities or major renovating of existing facilities, or capital campaigns.

• This first cycle is for six months only (January 1, 2017-June 30, 2017). The second grant cycle will open January 1, 2017 for the July 2017-June 2018 year.
Collaborative grant application process

phases and timeline

**Phase**

**Application Phase**
- **August 4th & 9th**: Application training
- **August 1st – 29th**: Full applications accepted
- **August 22nd**: Deadline for questions on application process

**Timeline**
- August 4th & 9th: Application training
- August 1st – 29th: Full applications accepted
- August 22nd: Deadline for questions on application process

**Key Activities**
- Training to review full application form
- Applicants prepare a comprehensive application package
- Applications should align with the new guiding principles and prosperity outcomes framework

**Review Phase**
- **September 23rd**: Invitation to present
- **October 12th – October 14th**: Presentation

**Evaluation Phase**
- **Twice per year**: Grantees submit data
- **Over the course of the grant**: Site visits conducted

**Key Activities**
- Invitation extended to present Collaboration no later than this date
- Applicants present to Committee

- Grantees submit data
- Evaluative site visits
Collaborative Grant
see handout

1 | Grant guidelines

2 | Collaborative grant menu
Scoring Rubric

- Minimum Requirements
  - 501(c)3 Organization
  - Audited Financials
    - Audit with management letter, 990 or Financial Compilation with footnotes
  - Secretary of State Certificate of Good Standing
  - Geographic fit
  - Grant Request within expected range

- Fit with the Blueprint for Prosperity
1. What is the social problem the collaboration aims to address?
   • Describes the challenge, issue or need
   • Describes the intended target population and geographic relevance and include data

2. What is the mission/vision and overall strategy for the collaboration?
   • Includes the goals, objectives and milestones
   • Includes any policy implication

3. Cite best practices and describe research or approaches that support your choices in designing this collaboration.

4. Who is involved?
   • Provide a list of stakeholders/participants/agencies
   • Describe shareholders involvement

5. Are there any other collaborations/groups working on this issue?
<table>
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<th>Application Section: Proposed Collaborative Grant Adherence to Guiding Principles</th>
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Grant Level Outcomes & Indicators

• Selects outcomes/indicators that are appropriate and reflect the stated intent of the program and the characteristics of the target population (i.e. it is reasonable to expect that the grant outputs will lead to these outcomes and indicators and that these outcomes are valuable and relevant for the target population and the grant fit with the population level indicator(s) chosen for this grant)

Measurement

• Outlines plan for data collection and methods. Data collection methods are timely and appropriate
• Structures (e.g., data collection system) are or will be in place to track, assess, and disaggregate data
• Provides instruments of measurement (i.e. attendance roster, meeting notes, tests, and/or a description of records that will be reviewed)
Revenue Narrative

- Line items on the budget form and in the narrative match, with the narrative providing further understanding
- Specific grants or contracts have been secured with UW funds as a match
- Challenge funding that required a match was secured to draw down the funds
- Services or other resources secured are at a substantially reduced cost due to VISTA volunteers stipends, transportation costs for donated building supplies, etc.
Guide to application questions
evidence of a strong answer…

Application Section: Financial Information (cont’d)

Expense Narrative

• Line items on the budget form and in the narrative match, with the narrative providing further understanding
• Expenditure categories and amounts that support the provision of the services described are adequately funded
• Adequate staffing pattern
• Adequate revenue secured or projected to cover the required expenditures – a balanced budget
• Explanation or justification of an unbalanced budget presentation
How to Apply

Grant application and attachments are due by 11:59 p.m. Central Time on August 29, 2016. **NO LATE** submissions will be accepted.

Submit on-line to grants@unitedwaysela.org only

Questions will not be accepted after 5PM on August 22, 2016
Thank you