



United Way
East Ontario

WORKING WITH COMMUNITIES
IN PRESCOTT-RUSSELL, OTTAWA,
LANARK AND RENFREW COUNTIES

RETURN TO
UNITED WAY EAST ONTARIO
130 PEMBROKE ST WEST
PEMBROKE, ON, K8A 5M8

Call for Proposal

Application and Guide

Renfrew County Branch

2020 Application

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OVERVIEW

This document provides a unified approach for all eligible applicants for the annual Call for Proposal funding cycle through the United Way East Ontario Renfrew County Branch Office.

Please return the completed application to the United Way East Ontario Renfrew County Branch Office by **19 February 2020**, or by **12 February 2020** for agencies completing a sponsored application in partnership with an eligible agency. A fillable PDF version of the application is available to you on our website: unitedwayeo.ca/partner-agencies/renfrew-county

Please review the entire document, including our updated eligibility criteria, as well as updated resources regarding key terms, our investment framework, Focus Areas, and assessment process.

For questions or concerns, please reference the below contact information.

Kaitlyn Johnson

**Administrative Coordinator,
Renfrew County Office**
T 613-735-0436
E kjohnson@unitedwayeo.ca
United Way East Ontario

Jade Nauman

**Regional Director, Directrice Regionale,
Renfrew County**
M 613-292-3754
E jnauman@unitedwayeo.ca
United Way East Ontario

CALL FOR PROPOSAL APPLICATION

Agency Details

Agency Name:	Program/Project Name:	Charitable Registration Number

a. Organizational Information

1. Describe the organization's experience and success in delivering similar programs/projects.
Provide evidence of specific results achieved with similar programs/projects.

2. Describe the organization's capacity to deliver the proposed program/project.
Including management and staff capacity, respectively.

3. Provide a brief description of your organization's core mission and a brief history.

4. Is your organization registered with 211 Ontario?

Y N

b. Focus Area Alignment

1. Please indicate the Focus Area addressed by your program/project:	
2. Briefly explain how your program/project aligns with and helps to support the Focus Area indicated above.	
3. Describe the demographic to which your program/project is targeted and will support.	

c. Program/Project Information

1. Is this application for a current or previous United Way funded program?	Y	N
a. If YES please provide the year(s) that this program was funded.		
2. Describe the specific need within the Focus Area that your program is addressing and how United Way funding would impact the target population.		
Make sure to include the populations served by your program.		

3. Provide a brief description of your program/project and its intended goal.

4. Describe your main/key planned activities.

For each activity describe what you will do, the specific population you are targeting, where the activity will take place, and when/how frequently you will be doing it.

5. Describe key partnerships (formal or otherwise) currently in place, new partnerships you will seek to develop during the program/project, and your relationship with other similar programs. Be careful to differentiate between current and future partnerships and provide partner names and roles. If you do not have any current partnerships and/or are not planning any during the program/project, use this space to explain why.

6. Is there any pertinent information you would like to add? (Optional)

7. Is this a collective impact model based program/project?

Y N

a. If YES, provide examples of how your program will meet the five conditions.

Common Agenda, Shared Measurement, Mutually Reinforcing Activities, Continuous Communication, and Backbone Organization Support.

8. Where will your program be offered? Your service location sites, not locations where clients live.

d. Evidence-Based Approach and Evaluation Plan

1. Will this program work directly with clients?	Y	N
a. If YES indicate the total number of unique individuals that you expect to serve in a 12 month period. Note that each individual should only be counted once, regardless of the number of times they have been served.		
b. If YES estimate how often, on average, each individual will be accessing your services. How many visits per individual weekly, monthly, annually, etc.		
2. Demonstrate how the proposed activities and results are backed by evidence-based or evidence-informed research. Both internal and external research is valid.		
3. Describe your indicating factors for success. How will data collected for your indicators be used from an operational perspective to improve the program/project?		

4. Identify a minimum of three performance indicators for monitoring progress in achieving results and explain how those results will be collected. Include for each indicator: the outcome/output, targets, frequency of data collection, and approach.

OUTPUT/ OUTCOME	TARGETS	COLLECTION FREQUENCY	APPROACH

e. Funding Request

1. How many years of funding are you requesting?	
2. What is the annual funding amount you are requesting?	
3. What is the total <i>annual</i> budget for your <i>program</i> ?*	
*the annual budget for this program, not the total budget for the organization.	
4. Describe how you plan to use funds provided by United Way.	

f. Annual Program/Project Budget

Revenue Sources:		
SOURCE	AMOUNT	BUDGET NOTES
Fundraising/Donations		
Program Fees		
Municipality		
Trillium Foundation		
Community Foundation		
Local Health Integration Network		
TOTAL REVENUE:		
Funding Requested:		From agencies other than United Way East Ontario
SOURCE	AMOUNT	BUDGET NOTES
TOTAL FUNDS REQUESTED:		
The amount indicated in your request for investment was:		

g. In-Kind Support

In-kind contributions are goods or services that an organization would otherwise need to purchase that are provided, free of charge, by other organizations/individuals. The value of in-kind contributions should be based on what you *would* have paid for the goods and services if you had to purchase them.

DESCRIPTION	AMOUNT	BUDGET NOTES
TOTAL IN-KIND:		

h. Expenses

EXPENSE	AMOUNT	BUDGET NOTES
Administration Expenses (rent, insurance, supplies, fax/phone, internet, accounting, and legal fees)		
Salaries and Benefits Expenses (permanent and contract staff)		
Staff/Volunteer Travel		
Client Transportation		
Program Costs		
Evaluation Expenses		
Miscellaneous Expenses		
TOTAL EXPENSES:		
EXCESS REVENUE:		

ACKNOWLEDGEMENT AND SIGNATURES

ACKNOWLEDGEMENT

I declare the information provided in this Proposal to be accurate and complete and compliant with the Eligibility Criteria. I acknowledge that, if information is found to be inaccurate in part or in whole, funding could be withdrawn. I declare that the organization is not insolvent nor does it have a high probability of becoming insolvent prior to the end of the program/project. I certify that this application has been authorized by the Applicant Agency.

INITIAL: _____

APPLICATION COMPLETED BY:

DATE COMPLETED	NAME	SIGNATURE

DOCUMENT CHECKLIST:

COMPLETED APPLICATION		AGM MINUTES		AUDITED FINANCIAL STATEMENTS	
LIST OF BOARD OF DIRECTORS		SPONSOR AGREEMENT		PROOF OF LIABILITY INSURANCE	

AGENCY AND SPONSOR SIGNATURES:

Signature of Agency Executive Director (or equivalent)	DATE
Signature of Agency Board Chair/President (or equivalent)	DATE
Sponsor Organization Name (if applicable)	
Signature of Sponsor Executive Director (or equivalent, if applicable)	DATE
Signature of Sponsor Board Chair/President (or equivalent, if applicable)	DATE

This page must be submitted before 4:00pm on 19th February 2020

ELIGIBILITY CRITERIA

General Criteria

All applicants must meet the following criteria:

- Applicant must be a registered charity with its own RR Number,
- Applicant must maintain a volunteer board that meets regularly,
- Applicant must host an Annual General Meeting,
- Applicant must have financial statements that have been audited by a licensed public accountant. *Charities with revenue less than \$250,000 may submit reviewed financial statements **only if they have been funded by one of United Way East Ontario's local offices in Prescott-Russell, Ottawa, Lanark or Renfrew Counties within the past five years (2015/16 - 2019/20) and are in good standing with the organization (i.e. met the terms and conditions of their funding agreement).***

If any of the above criteria are not met, applicants must enter into a formal partner sponsorship agreement with a charity that meets all the above listed criteria.

Other Criteria

- The activities proposed by the applicant must benefit residents in Renfrew County or the City of Pembroke,
- The applicant's primary focus and mandate must be within the social services sector,
- The request submitted by the applicant must clearly support stated Focus Area,
- The applicant (or partnering sponsor organization) must be financially solvent.
- The applicant must carry sufficient liability insurance, at least \$2 million, to cover the program/project seeking United Way funding,
- **Late or incomplete submissions will not be accepted.**

Sponsor Partnership

If any of the general criteria are not met, applicants must enter into a formal partner sponsorship agreement with a registered charity that meets all of the general criteria. Once a partner has been identified, the sponsor agency must contact the local United Way East Ontario branch to communicate the intent to submit as a sponsor agency. The Sponsorship must be done and provided to UWEO by **12 February 2019** at the latest. The Sponsorship Authorization form used when establishing a sponsorship relationship between organizations can be provided to you upon request.

Applicants Ineligible for Funding

- Registered charitable organizations sponsoring for-profit organizations or for-profit ventures, with the exception of social enterprise or non-profit community economic development activities;
- Hospitals or medical treatment programs;
- Educational institutions and organizations including school boards, schools, universities, colleges, and parent-teacher associations;
- Faith-based organizations that require an adherence to or promotion of a religious faith as a condition of receiving supports or services;
- Fundraising events or organizations, service clubs, and foundations that act primarily to raise funds for distribution to other organizations, with the exception of foundations that are raising funds for a directly related organization;
- Organizations whose policies or practices contravene the Ontario Human Rights Code.

Costs Ineligible for Funding

- Retirement of debts or budget deficits,
- Costs for capital equipment or expenses related to construction or the development of facilities,
- Wage subsidies for program participants.

UNITED WAY EAST ONTARIO INVESTMENT FRAMEWORK

Investment Guiding Principles

- Invest resources where they are needed the most and where they will have the greatest impact.
- Invest to make a measurable difference in the community
- Invest in a range of strategies to support the Focus Area goals; including front line programs and services, convening, research, and speaking up.
- Invest in accordance with the evolution of the Focus Areas that reflect the needs of the community.
- Invest to promote collaborative efforts to advance the Focus Areas.

Investment Priorities

United Way's current goals for investment focus on specific issues that cut across disadvantaged populations to achieve community impact. To advance these goals, we invest for results in terms of people served, program outcomes, and lives changed for the better.

These goals are designed to:

- Address root causes or systemic issues,
- Offer rich opportunities to align the work with multiple community partners,
- Enable evidence-based approaches, and
- Capitalize on community energy.

United Way aims to deliver on the following outcomes within each of the three Focus Areas:

All That Kids Can Be

- Children and youth have access to mental health, crisis, and addiction supports;
- Children and youth have the supports they need to start school ready to learn; and
- Children and youth are engaged and active outside of school and have a safe place to learn, play, and grow.

From Poverty to Possibility

- Decrease homelessness and improve housing support services; and
- Increase employment opportunities for all.

Healthy People, Strong Communities

- Adults have access to mental health and addiction supports;
- Adults in crisis have access to supports; and
- Help seniors improve wellbeing, maintain their independence, and reduce isolation.

ASSESSMENT CRITERIA

Scoring Range: Type of score an assessor can assign: a scale of 1-5 or a flag statement.

(Clear or unclear, depending on the assessors determination and the particular flag)

Ranking Weight: A multiplier or amount of significance assigned to that particular question.

(If the weight is 2 and the assessor scored a 3, then the total weighted score for that question would be 6)

Maximum Points Possible: If the criteria received the highest available score, which is always 4, the result of multiplying that score by the ranking weight.

(If the ranking weight is 1.5 and a score of 5 is given, the maximum points possible is 7.5)

Question: This refers to the question in the application to which the criteria/consideration applies.

Section Weight: The product of all questions' weights in a particular section.

Overall Ranking: The Section Total multiplied by the Section Weight; all sections added together to get the Total Overall Ranking value.

SCORING RUBRIC

1 No Evidence	2 Poor Evidence	3 Fair Evidence	4 Strong Evidence	5 Excellent Evidence
Question is not answered <u>or</u> no information provided in the response addresses the question.	Content lacks meaningful detail and/or demonstrates a lack of understanding of the elements needed for the program/project to achieve results that will contribute to supporting the Focus Area.	Content lacks some meaningful detail and requires important additional information in order to be reasonably comprehensive <u>or</u> the response suggests the criteria were not fully understood. Content reflects a partial understanding of the elements needed for the program/project to achieve results that will contribute to supporting the Focus Area.	Content addresses the criteria in a reasonably comprehensive manner with significantly detailed and mostly accurate information. Content reflects a solid understanding of the elements needed for the program/project to achieve results that will contribute to supporting the Focus Area but may require extra specificity, support, or elaboration.	The content addresses the criteria with specific, appropriately detailed, and accurate information. Content reflects a thorough understanding of the elements needed for the program/project to achieve results that will contribute to supporting the Focus Area.

AGENCY EVALUATION – To be completed by United Way East Ontario

AGENCY NAME:				
Section	Total	Section Weight	Overall Ranking	Notes
A		4		
B		5		
C		6		
D		5		
E		2		
F – H		1		
		TOTAL:		

ASSESSMENT CRITERIA CONTINUED – Application Question Assessment Breakdown

QUESTION	CONSIDERATIONS IN SCORING	RANKING WEIGHT	SCORING RANGE	MAX. POINTS POSSIBLE
A 1	<ul style="list-style-type: none"> - How successful is the agency at delivering the other programs/projects it runs? - Does the agency have a history of successful/unsuccessful programs? - Are the programs similar to what is being proposed? Scope, scale, method, issue being addressed. - Are the results provided specific and demonstrative of real/significant impact? Examples would include: providing actual percentage change in program outcomes, citing specific policy or systemic changes attributable to the program, etc. 	2	5	10
A 2	<ul style="list-style-type: none"> - Does the agency, management and staff, have the ability and capacity to deliver the proposed program? Experience implementing/managing similar programs? - Does the agency have sufficient staff or external support to handle workload? 	2	5	10
A 3	<ul style="list-style-type: none"> - Is the program/project consistent with the core mission of the applicant agency? - Is there evidence of mission drift? 	Flag	Aligned / Not Aligned	Flag
A 4	<ul style="list-style-type: none"> - Is the organization registered with 211? 	Flag	Yes / No	Flag
TOTAL:				20
B 2	<ul style="list-style-type: none"> - Refer to the definition for the Focus Area. - Evaluate the evidence provided to clearly show that the program/project supports and will help support the Focus Area - Does the target audience indicated align with the Focus Area? 	5	5	25
TOTAL:				25
C 2	<ul style="list-style-type: none"> - Does the description go beyond the Focus Area description to explain the specific need being addressed? - Is there a clear description of who the specific target population is and how they would be impacted by this program? - Is there a causal link between the described impact and the need? - Is the impact realistic considering the scope of the project? 	2	5	10
C 3	<ul style="list-style-type: none"> - Is the goal of the program/project clearly stated? - Is the goal aligned with the Focus Area the organization has indicated it is supporting? 	1	5	5
C 4	<ul style="list-style-type: none"> - Is there a clear link between the stated activities and the ultimate goal? - Are the “who, what, when, where, and how” explained? - Will the activities presented result in the achievement of the stated results? - Are the activities reasonable? Are there unrealistic expectations? 	2	5	10

CONTINUED

QUESTION	CONSIDERATIONS IN SCORING	RANKING WEIGHT	SCORING RANGE	MAX. POINTS POSSIBLE
C 5	<ul style="list-style-type: none"> - Partnerships can be formal or informal: Formal could be a signed partnership agreement, formal collaboration, etc. Informal could be in-kind support, sharing of information, assistance with evaluation process, etc. - Is the applicant agency working in partnership with other organizations to implement this program? - Have partner names been provided and roles defined? - Has the nature of the partnership been defined? - Has the funding or in-kind contribution been described? - If no partnerships are described, is there a reasonable explanation why not? 	1	5	5
C 7	<ul style="list-style-type: none"> - How far along is this agency in satisfying the five conditions? - Is the evidence of the five conditions being met clear and convincing? 	0.5	5	2.5
C 8	<ul style="list-style-type: none"> - Are there other programs/projects in the same geographic area offering the same or highly similar services? - If duplication exists, is that duplication necessary to fill a gap in service? - The answer will allow UWEO to ensure that resources are invested efficiently and effectively. 	Flag	Duplication / No Duplication	Flag
TOTAL:				32.5
D 1	<ul style="list-style-type: none"> - Does the program have a realistic reach into the community? - Is the impact satisfactory for the target population? - Does the impact compare to similar programs currently in place? 	1	5	5
D 2	<ul style="list-style-type: none"> - Is the relationship between the proposed activities and the anticipated results evidence informed? - How well is the relationship articulated? - Evidence can take form of internal research or external research. - Is the evidence presented relevant? - Are the proposed activities reasonable for the demographic? 	2	5	10

CONTINUED

QUESTION	CONSIDERATIONS IN SCORING	RANKING WEIGHT	SCORING RANGE	MAX. POINTS POSSIBLE
D 3	<ul style="list-style-type: none"> - Is the explanation satisfactory and does it provide assurances that this agency can provide strong results that are aligned with the desired outcomes of the goal? - Are the targets selected ambitious enough to be a solid investment, yet achievable given the staffing and financial resources? - If custom indicators are developed, will they tell us how much was done, how well it was done, or if anyone is better off? - Are custom indicators SMART? (Specific, Measurable, Achievable, Realistic, Time-Bound) - Do custom indicators proposed align with what United Way is trying to achieve with the selected Focus Area? 	5	5	25
D 4	<ul style="list-style-type: none"> - Each indicator described should contain all the below information: - <u>Output or Outcome</u>: An <i>outcome</i> indicator normally implies directional change using words such as increase, decrease, reduce, improved, etc. An <i>output</i> indicator typically reports on short-term results or actions that are needed in order to achieve an outcome and uses action words such as trained, completed, identified, evaluated, etc. - <u>Targets</u>: Should be specific, realistic, and ambitious. Targets should be numeric and cannot be a range. Number, percentage, and complete/incomplete are common accepted target measurements. - <u>Frequency of Data Collection</u>: How often data is completed; daily, weekly, monthly, quarterly, annually, etc. - <u>Approach</u>: The approach or plan to collect the data, including how results will be calculated. Describe the steps to calculate the necessary figure or determine the result. It should be clear whether the data source is internal or external. 	5	5	25
TOTAL:				65
E 1-3	<ul style="list-style-type: none"> - What proportion of the program/project budget is being requested from United Way? - Is the program sustainable? 	.5	5	2.5
E 4	<ul style="list-style-type: none"> - How are funds from United Way being used within the project? - Are the details aligned with the Eligibility Criteria? 	1	5	5
TOTAL:				7.5

CONTINUED

QUESTION	CONSIDERATIONS IN SCORING	RANKING WEIGHT	SCORING RANGE	MAX. POINTS POSSIBLE
F – H	<ul style="list-style-type: none"> - What proportion of the program/project is being requested from UWEO? - Is there a heavy reliance on any single funder to run the program? - Are budget notes present and sufficiently detailed? - Are in-kind costs included and is the total revenue of in-kind costs calculated? - Are costs reasonable given the individuals being assisted? - Are costs reasonable given the depth and resources needed for the intervention? - Are costs reasonable given the number of clients being assisted? - Are expenses realistic? Are they true reflections of cost associated with the program/project? - Geographic area, types of clients, types of services provided can all have an effect on cost efficiency; different programs in different areas could have widely differing costs depending on volunteer engagement, availability of other neighbourhood supports, etc. 	2	5	10
			TOTAL:	5
			GRAND TOTAL:	160

GLOSSARY OF TERMS

Administration Expenses	Rent, insurance, office supplies, fax/phone. Internet, accounting and legal fees, courier and postage, etc.
Coalition	An alliance of agencies/organizations for a common action or purpose.
Collective Impact	<p>An approach that should not be confused with the broader term “Community Impact” or other forms of collaboration and partnership. Organizations have attempted to solve social problems through collaboration for decades without producing results, the vast majority of these efforts lack the elements of success that enable Collective Impact initiatives to achieve a sustained alignment of efforts. There are <u>five</u> distinct conditions needed in a true Collective Impact model, these conditions must be in place to be considered a Collective Impact model by United Way East Ontario:</p> <ul style="list-style-type: none">• Common Agenda – a shared vision for change including a common understanding of what the problem is, and a joint approach to solving it through agreed-upon actions.• Shared Measurement – collecting data and measuring results consistently across all activities ensures efforts remain aligned and the partners hold each other accountable.• Mutually Reinforcing Activities – strategies and activities must be differentiated while still being coordinated through a mutually reinforcing plan of action. There is no space for duplication.• Continuous Communication – consistent and open communication is needed across the many players, including agencies and funders, to build trust, assure mutual objectives, and create common motivation.• Backbone Organization Support – creating and managing collective impact requires separate organization(s) with resources and specific skill sets to serve as the backbone for the entire initiative and play a key coordination role with organizations, agencies, and funders.
Community Impact	Investments to influence community change (programs that benefit broader community, convening, research, and speaking out).
Common Indicators	Indicators that all programs under a Focus Area are asked to report on if their work aligns to the result being measured.
Direct Impact	Investments in front-line programs and services that benefit individuals.
Evaluation Expenses	Expenses required to conduct program evaluations, baseline surveys, mid-term evaluations, operational research, etc. Excludes transport and staff time.
Evidence-Based Research/Support	Can take the form of published research or data, past program/project results, surveys, focus group results, etc. that validate the relationship between the program activities, Focus Area(s), and intended results.
Financial Solvency	In an organizational context, the ability of the organization to fulfill its financial commitments.
Focus Areas	<p>Provide the overall framework within which UWEO will apply its efforts and investments in the community. There are three Focus Areas:</p> <ul style="list-style-type: none">• All That Kids Can Be: to help kids grow up to be their very best, we invest in programs and initiatives that will prepare them for education and give them a safe place to go after school to play, learn, and just be a kid.• From Poverty to Possibility: programs and initiatives that get homeless youth off the streets for good, help immigrants find jobs that match their skills, and give people with disabilities employment opportunities and a sense of belonging in their community.• Healthy People, Strong Communities: ensuring all members of our community get the help they need, when they need it.
Funding Categories	<p>There are four categories of investment opportunity for each of the Focus Areas. Combined, they represent a holistic approach to realizing United Way’s goals, they include:</p> <ol style="list-style-type: none">1. Programs and Services2. Convening and Engagement3. Policy and Advocacy4. Research

Continued...

GLOSSARY OF TERMS

Indicator	<p>Provides evidence that certain results have or have not been achieved. Indicators should meet the following criteria:</p> <ul style="list-style-type: none">• Direct – measure as closely as possible to the relevant result.• Objective – precise and unambiguous about what is being measured and how. There should be no doubt on how to measure or interpret the indicator.• Adequate – should sufficiently capture all of the result.• Practical – quality data needed to inform the indicator are available in the given timeframe.
Outcome Indicators	<p>Measure the broader results achieved through provision of services, in this case at the program or project level. Outcomes quantify the actual effect the agency's efforts have on its objectives. Outcomes measure if anyone is better off or, in the case of system-level programs, whether or not the key desired goal has occurred.</p>
Output Indicators	<p>Measure the quantity and quality of services provided. How much you did and how well you did it.</p>
Policy and Advocacy	<p>Activities designed to increase the community's understanding of the importance of an issue and/or the need of address policies and strategies to change, reduce, or remove barriers. Advocacy can include a wide range of activities that an organization undertakes, including media campaigns, public speaking, educational seminars, lobbying for policy changes, etc.</p>
Research	<p>Activities that create and mobilize knowledge for action by communities, civil society, policy makers, and stakeholders in all of the key areas affecting the current and future social, economic, and environmental sustainability of Canada.</p>
Social Services Sector	<p>Organizations/agencies whose mission is to provide meaningful opportunities to improve the lives of the disadvantages population groups (children, disabled persons, seniors, and vulnerable persons in the community) by providing services such as educational support, day programs, counselling, housing support, skills development, etc.</p>
Target Population	<p>A specified group of people who are the focus of any work toward supporting each Focus Area.</p>
Target Result	<p>A measurable performance or success level that a program or initiative plans to achieve within a specified period of time. Both Outcome and Output Indicators require specific targets which could be numbers, percentages, complete/not complete, yes/no, etc.</p>