

# United Way of Tucson and Southern Arizona

UnitedWayTucson.org

# LIVE UNITED



## 2017 Community Impact Request for Proposals (RFP)

### Introduction

United Way of Tucson and Southern Arizona is accepting funding proposals to address community impact goals in Early Literacy, Financial Stability, and Senior Support.

All program proposals must meet the application requirements that directly contribute to the goals from one of the areas listed above and must include required components and measures outlined in the section “United Way Impact Area and Goals.” The review process will occur during September 2017.

This RFP process has been developed with the input and best thinking of volunteers, agency representatives and United Way employees. If you have any questions, UWTSa staff are available to answer questions concerning the RFP.

**Electronic proposals must be submitted on or before September 1, 2017 5:00 P.M. to UWTSa staff in the corresponding area.**

**No late submissions will be accepted.**

**Early Literacy:** Patricia Montijo, Sr. Program Manager, [PMontijo@unitedwaytucson.org](mailto:PMontijo@unitedwaytucson.org); 520-903-3903

**Financial Stability:** Ken Briggs, Sr. Director; [kbriggs@unitedwaytucson.org](mailto:kbriggs@unitedwaytucson.org); 520.903.3914

**Senior Support:** Therese Perreault, Sr. Director, [TPerreault@UnitedWayTucson.org](mailto:TPerreault@UnitedWayTucson.org); 520.903.3924

### **RFP IMPORTANT DATES**

September 1, 2017	Applications due by 5:00 P.M.
September 20, 2017	Agencies Notified of Tentative Award Pending Board Approval
October 2017	Contracts Negotiated with Funded Partners

## Eligibility and Application Requirements

1. All programs funded must address the UWTSA targeted strategies from one of the following goal areas: Early Literacy, Financial Stability, or Senior Support.
2. UWTSA funds should be no more than 50% of the program budget—UWTSA funds need to be matched by other resources (case and in-kind) and specified on the budget.
3. Organizations are responsible for submitting thorough and complete information in their proposal.
4. Applicants must be on the list of 2017 Arizona Qualifying Charitable Organization (QCO) serving Pima County, Arizona, and must maintain their status as a QCO through consecutive years of funding. Reference: <https://www.azdor.gov/about/faqs/charitabletaxcredit.aspx>
5. Applicants who previously received funding from United Way must be current with all reporting requirements.

## Recommendations for Proposal Preparation

1. Make sure the proposal is a complete reflection of your program, and use **clear, concise** and **compelling** language. **Paragraphs with a few key points are most effective.**
2. The proposal period is for one calendar year with estimated multiple year (3-5 years) renewals based on performance. The United Way staff and proposal reviewers will recommend actual annualized amounts to the Board of Directors based in part on the amount of funds available and the board approved budget. There is no anticipated annual increase in funding.
3. For the first year of funding, the allocated funding is retroactive to July 1, 2017, with the contract ending on June 30, 2018.
4. Identify the appropriate level of annual funding for your proposal. This RFP offers the opportunity to ask for funding in the ranges specified by service area. United Way reserves the right to fund the entire amount requested and/or more or less than the amount requested.

## How Funding Decisions are Made

UWTSA's Program Review and Investment process includes the following steps:

### **Step One: Staff Review of Program Proposals**

Staff will review proposals to ensure applications meet eligibility requirements and distribute eligible proposals to Proposal Reviewers.

### **Step Two: Panel Review for Funding Recommendations**

Proposal Reviewers will rate proposals and make funding recommendations. No agency that submits a proposal may participate in making the funding recommendation.

### **Step Three: Funding Recommendation Approvals**

Funding recommendations will be presented to the United Way Board of Directors for final approval.

# 2017 Community Impact Request for Proposals (RFP)

## PROPOSAL COVER PAGE (Required)

Name of Applicant Organization:

Mailing Address:

Name of Project:

Total Agency Budget:

Total Project Budget:

Amount Requested from United Way:

Community Impact Area:  Early Literacy  Financial Stability  Senior Support

Contact Person:

Title:

Phone:

Email:

Fax:

Website Address:

**Brief Description of the Project:** (Maximum 500 characters)

**Please attach the following required documents:**

- 501(c)3 document
- Most recent financial audit
- Submit current documentation of Arizona Qualifying Charitable Organization status
- 2017 Board of Directors full roster

**Required Signatures:**

We certify that the information contained in this application is, to the best of our knowledge, true and accurate, and that this application is submitted with the Board of Directors' full knowledge and endorsement:

President/CEO: \_\_\_\_\_

Name

Title

Signature

Date

## Funding Direction

### **Area of Focus:** Early Literacy

**Rationale:** Research shows that students not reading proficiently by fourth grade are four times more likely to drop out of school. Outcomes are markedly worse for children in poverty. In Pima County, only 41% of 3<sup>rd</sup> graders are reading at grade level—a critical milestone where children shift from learning to read to reading to learn. Third grade reading is one of the milestones identified by the Cradle to Career Partnership and applications in this area should be in alignment.

**Eligibility:** Agency is qualified as an Arizona Qualifying Charitable Organization; program increases access to books and reading for children and families; program serves children within the birth to eight population; program has documented effectiveness.

**Funding Parameters:** Programs funded will be in the \$10,000 - \$25,000 range

### **Application Questions:**

1. Describe the program for which you are requesting support and how it aligns with the 3<sup>rd</sup> grade reading milestone.
2. How does your program address 3<sup>rd</sup> grade reading proficiency?
3. Which ages of children (0-8) do you serve with this program?
4. How many children will be served?
5. If relevant, how many parents/caregivers will be served?
6. How many books will be distributed to children through this program?
7. How will you track the number of books distributed?
8. Other than books distributed, what other key measures do you use to determine program effectiveness (e.g., parent involvement in children's learning)?
9. Describe the evidence that supports your program's ability to help children increase reading proficiency and love of reading?
10. Please complete the budget form and describe other committed or potential sources of funding support for this program.

## **Area of Focus:** Financial Stability

**Rationale:** Research about the efficacy of financial capability training (also referred to, sometimes, as financial literacy or financial education) yields mixed results, yet many organizations feel compelled to offer, and sometimes mandate, some kind of financial education for clients they serve. United Way of Tucson and Southern Arizona seeks organizations with experience in providing financial education to take part in a learning project that increases our knowledge about the needs and experience of low-income individuals and families and about the approaches and practices that are most effective in helping them manage spending, saving, and building assets in ways that improve their lives.

**Eligibility:** Agency is qualified as an Arizona Qualifying Charitable Organization; agency currently provides financial capability training for adults; agency agrees to participate and use some of the funding for assessments, evaluation, and continuous improvement; agency agrees to share learning with other agencies and the community.

**Funding Parameters:** Programs funded will be in the \$25,000 - \$40,000 range.

In addition to the basic eligibility requirements, applicants should respond to the following questions and requests for information.

1. What's your agency's mission and what services do you currently provide?
2. How many adults do you serve annually through your financial capability training program? How many do you expect to serve with the proposed budget?
3. What are the characteristics of this population?
4. How do they learn about your services?
5. Describe the format of your financial capability training program.
6. What requirements do you have for participation?
7. Provide a chart of program and organizational positions key to the implementation of your program and provide brief professional biographies of the personnel engaged in the work.
8. How will you measure success? Describe your evaluation plan. It should include how data is gathered, key data points, and desired outcomes.
9. If you could provide the ideal financial capability training program, what would it look like? Cite any research or other evidence that supports your ideals.
10. What are the basic principles that would guide your ideal financial capability training program?
11. Please complete the budget form and describe other committed or potential sources of funding support for this program.

**Area of Focus:** Senior Support

**Rationale:** Tucson, Pima County and Southern Arizona are growing destinations for early retirement through end of life. Tucson is known as an affordable place to retire and a good place to escape harsh winters in other parts of the country.

Pima County's 60+ population increased 14.9% in the last 5 years (2010-2015). The 60+ year old population is growing 5.5% faster than the population of Pima County as a whole. The fastest growing segment of the aging population is individuals over 85, the most vulnerable who tend to need long-term care and whose numbers are expected to double by 2020. 50% of individuals age 85+ have one or more chronic (on-going) disability conditions that require assistance with Activities of Daily Living (ADLs). And the population 60 and over with a disability is 35.2%. Source: U. S. Census American Community Survey, 2015.

As population increases, and individuals needing greater assistance with ADL increases, the existing resources and service providers for older people are becoming more constrained. Extending the capacity of existing service providers for older people with volunteers is critical to providing support for older people in our community.

**Eligibility:** Agency is qualified as an Arizona Qualifying Charitable Organization; provides volunteer programming for vulnerable seniors.

**Funding Parameters:** Programs funded will be in the \$8,000 - \$15,000 range

**Application Questions:**

1. Describe the volunteer program for which you are requesting support and how it aligns with supporting seniors.
2. How does your program address the need for volunteers to support seniors?
3. How many seniors will be served?
4. How many volunteers will be part of this program?
5. How many volunteer hours do you project will be delivered?
6. How will you track the number of volunteer hours?
7. What key measures do you use to determine program effectiveness?
8. Describe the evidence that supports your program's ability to help seniors remain independent and in their homes longer.
9. Please complete the budget form and describe other committed or potential sources of funding support for this program.

Please feel free to adapt the income and expense line items to fit your project. If you need to provide additional information, you may do so.

Program Budget for 2017 Community Impact Proposal				
PROJECT EXPENSES	UWTSA	OTHER	TOTAL	NOTES
<b>Salaries:</b> List Position(s)				
<b>ERE:</b> Benefits				
<b>SUBTOTAL A:</b>				
<b>Contract Services:</b> List				
<b>Direct Costs:</b> List				
<b>In-Kind:</b> List/Describe				
<b>SUBTOTAL B:</b>				
<b>Indirect Costs</b> ( _% of total): List				
<b>SUBTOTAL C:</b>				
<b>GRAND TOTAL (A+B+C):</b>				

PROJECTED INCOME	UWTSA	OTHER	TOTAL	NOTES (Please describe and indicate pending or secured)
<b>UWTSA</b>				
<b>Government</b>				
<b>Foundations</b>				
<b>Corporations</b>				
<b>United Way</b>				
<b>Individuals</b>				
<b>Fundraising Events</b>				
<b>Membership Income</b>				
<b>Fees</b>				
<b>Other (specify)</b>				
<b>TOTAL:</b>				

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