



United Way
of Mifflin-Juniata

UNITED WAY OF MIFFLIN-JUNIATA

REQUEST FOR PROGRAM FUNDING 2022-2023

INTRODUCTION

ABOUT UNITED WAY OF MIFFLIN-JUNIATA

Mission: To improve people's lives by mobilizing the caring power of the community.

The United Way of Mifflin-Juniata (UWMJ) is an organization dedicated to providing leadership, uniting the community, actively identifying community needs, and bringing together the resources necessary to improve the quality of life for all citizens. We strive to accomplish our mission by uniting citizens in efforts to plan, support, and deliver effective human care programs around the areas of Education, Income and Health.

PURPOSE OF THIS REQUEST FOR PROPOSALS

To improve lives in our community, UWMJ invests donors' gifts in exceptional programs that make measurable progress towards fulfilling our mission. The purpose of the Request for Proposal (RFP) is to encourage organizations doing outstanding work in the areas of Education, Income and Health to apply for funding.

GRANT ELIGIBILITY & GUIDELINES

ELIGIBILITY GUIDELINES FOR APPLICANTS

The following requirements must be met in order for a program to qualify for UWMJ funding:

- Must be a 501(c)3 organization.
- The proposed program must concentrate its efforts and services within Mifflin and/or Juniata counties.
- Funding requests are available to human service agencies that meet the requirements of the Partnership Eligibility Criteria.
- The proposed program must fall under one of the three impact areas of Education, Income and Health.
- Each funding request should be limited to a minimum of \$5,000 and a maximum of \$40,000.

PROPOSAL COMPLIANCE REVIEW

- Applications that are not fully completed, do not provide all necessary documents, or do not meet the deadline will be reviewed separately by the board and may not be approved for UWMJ funding.
- All applications must be completed in electronic format. No hand written applications will be accepted.
- Faxes are not acceptable, completed packets may be mailed or hand delivered by the specified deadline. The delivery of this packet is the responsibility of the applicant and all packets are final upon submission.

REVIEW PROCESS

- Once the proposal passes the compliance review, all applications and supporting documentation will be reviewed. The Community Investment volunteers will expect to have a complete picture of the program, the needs being addressed, and the level of appropriateness for UWMJ funding.
- Mandatory in-person presentations will be scheduled after proposals have been submitted for the Community Investment Review Committee to ask key questions and get a better understanding of the program.
- Additional information may be requested by UWMJ.

EVALUATION

- Proposals will be evaluated by the Community Investment Review Committee using the Proposal Evaluation Form. The proposal is divided into five major sections which are listed below under Program Proposal Evaluation Criteria.
- The Community Investment Review Committee consists of at least 20 community volunteers who will divide up into four groups to evaluate the programs. There will be at least 5 community members evaluating each applicant.
- The Proposal Evaluation Form will be used by the Community Investment groups to determine if the five criteria are meeting expectations for UWMJ funding.

Program Proposal Evaluation Criteria

1. **COMMUNITY NEED:** Does the program clearly show the need for this program by using relevant research and data?
2. **IMPACT:** Is there clarity regarding the outcomes of the service and the potential impact on a community condition over the long term evident?
3. **EVALUATION:** Are the outcome indicators measurable and directly tied to the target outcome? Are the methods of measuring outcomes clearly stated?
4. **PREPARATION/EXPERIENCE:** Are there adequate staff/volunteers to handle the program? Is adequate financing in place? Does the program have a sound plan?
5. **UNITED WAY COMMITMENT/PARTNERSHIP:** Is there year-round demonstrated commitment to working in a partnership with UWMJ?

RECOMMENDATIONS

- Community Investment Review Committee convenes at Final Review Night in May 2022 in order to develop funding recommendations for each program under consideration. An initial set of funding recommendations will be presented based on the Community Investment groups' Proposal Evaluation Form. The Community Investment Review Committee will then as a whole, discuss the overall evaluation, adjust funding levels where necessary, and approve final funding recommendations.
- If an RFP is removed from the funding process, the applying organization will receive detailed feedback explaining the decision in May 2022.

FINAL APPROVAL

- The final funding recommendations of each Community Investment Review Group will be reviewed and ratified by the UWMJ Board of Directors. The decision of the Board is final.
- The UWMJ Board will approve final funding amounts on May 25th, 2022. Funding decisions and detailed feedback explaining the funding decisions will be promptly communicated to each organization.
- If awarded funding, a "Statement of Partnership" between the agency and the UWMJ will need to be completed by the end of June.

CHANGES IN REPORTED INFORMATION

If reported information changes during the community investment process (after submission of the application but before funding has been awarded), the organization must submit written (preferably via email) notification to UWMJ immediately upon being aware of the change. The written documentation must include what the change has been, why the change was made, and the effect the change will have on the program. Please direct such communication to the Executive Director.

If reported information changes after the program has been funded (after the grant has been awarded and organization has started to receive funding), the organization must submit notification to UWMJ within 30 days after the organization becomes aware of the change. The documentation given to the UWMJ in regards to the change must explain what the change has been, why the change was made, and what the effect of the change is on the program. Please direct such communication to the Executive Director.

MONITORING

All programs that are awarded funding will be required to track and report outcome results at the January UWMJ partner meeting.

Partner Agency site visits may be scheduled at any time during the year and may be conducted by community volunteers, UWMJ Board Members, and staff.

APPLICATION INSTRUCTIONS

COMPLETED APPLICATION CHECKLIST

All documents must be submitted at the same time and should include:

- United Way of Mifflin-Juniata Agency Program Allocation Application**
- Program Financial Overview (PFO)**
- Agency Financial Review form**
- Partnership Eligibility Criteria with signature and all attachments**

PROGRAM APPLICATION DETAILS

- **TEXT FORM FIELDS** are used in this word document. The grey boxes indicate areas where you are to enter your information. You have an unlimited amount of space for your narratives but we caution you to keep your information brief and concise.
- **CHECK BOXES IN TEXT FORM FIELDS** – to use this function, double click on the text box, a new window will open, under “default value” – choose “checked” to mark the box of your choice.
- Do NOT include supplemental information
- Do NOT add worksheets to the excel spreadsheets
- **OUTCOMES:** Partner Agencies will submit expected outcomes for all of the programs presented for funding. Provide measurable outcomes that you expect participants in the program to experience. If you received funding in the prior year and are reapplying for support for the same program you must demonstrate your outcomes from 21/22 on the logic model matrix. **Remember, outcomes are changes in behavior, skills, awareness, knowledge and attitude. Your measurements should be measurable, quantifiable, and tangible. Outputs are not to be confused with outcomes.**

PROGRAM FINANCIAL OVERVIEW (PFO)

- Do not add worksheets, columns, rows, etc. to the document.
- Please complete the entire form using the information below for guidance:
 - A. **REVENUE**
 - *Support from the Public:* Contributions from Charitable organizations (other than United Way of Mifflin-Juniata) including Foundations, Civic Groups, Corporations, Individuals, etc.
 - *United Way of Mifflin-Juniata Funding:* Funding only from United Way of Mifflin-Juniata being requested.
 - *Government Fees and Grants:* All revenue received from government sources (federal, state, county, city, Medicaid, Medicare, etc.).

- *Earned Income:* Membership Dues, Assessments, Program Service fees, fees paid by clients, etc.
- *Fundraising:* Special Events, Sales to the public (net of expenses).
- *Other:* Revenue that cannot be reported on another line.

B. EXPENSES

- *Salaries:* Salaries and wages subject to withholding earned by this program's full and/or part-time staff.
- *Employee Benefits:* Amounts paid and accrued by an Organization for this program under its own or other employee health or retirement benefit plans, including voluntary termination or retirement payments outside a formal plan.
- *Payroll Taxes:* Includes Social Security (FICA) taxes, worker's compensation, insurance premiums (professional and liability), unemployment compensation, payable by employers for this program under federal, state or local laws.
- *Professional Fees:* Fees and expenses of professional practitioners and consultants who are not employees of the Organization but are engaged on an independent contract basis for this program.
- *Supplies, Printing, Duplicating:* Cost of material and other supplies used by the program such as pens and note pads. Also costs for printing and other informational material produced outside the reporting Organization as well as marketing costs for the program.
- *Travel/Conference/Staff Development:* Travel and transportation costs for staff and volunteers while attending training or conference for the program.
- *Telephone:* Cost for use of the telephone for local and long distance services for this program.
- *Occupancy:* Expenses incurred from this program's occupancy and use of leased or owned land, buildings and offices. Includes heat, light, water, maintenance, property insurance, property tax and mortgage interest.
- *Payments to Affiliates:* Dues to a statewide, regional, or national organization, if applicable for this program.
- *Other Expenses:* All expenses for this program not reportable on another line.

AGENCY FINANCIAL REVIEW

- Complete the entire form by calculating the overhead rate and answering the questions regarding operating reserves.
- The two required attachments must be submitted with the Agency Financial Review Form and labeled appropriately.
- The Audit and 990 MUST indicate where reconciliation occurs between the total revenue and total expenses (NOT assets and liabilities) on each document. Reconciliation may be shown directly on the documents or may be provided in a separate statement. Submitting a copy of Schedule D only is not acceptable. An example of this is provided with the application.

PARTNERSHIP ELIGIBILITY CRITERIA

- All required documents must be included with the final application. All attachments must be labeled in the top right corner of the document as indicated and submitted in the correct numerical order.
- An Executive Director or President signature is required on the final submission form.

TIMELINE

❖ PROPOSAL RELEASE DATE

Friday, February 18, 2022

❖ OUTCOMES TRAINING (PARTICIPATION STRONGLY ENCOURAGED)

Thursday, February 24, 2022

8:30 AM – 11:30 AM

MC Annex Building (Across from the Courthouse)

❖ PROPOSAL Q&A (OPTIONAL)

Friday, March 4, 2022

11:00 AM – 12:00PM

Zoom Meeting

<https://us02web.zoom.us/j/3111920429?pwd=a1FIOG1ORHcwZ1NDaTJvV0tyQllkQT09>

Meeting ID: 311 192 0429

Passcode: 2489636

❖ PROPOSAL SUBMISSION DEADLINE

Friday, March 18, 2022

Prior to Noon

13 E. Third Street Lewistown, PA. 17044

❖ AGENCY INTERVIEWS

May 2, 2022 and May 3, 2022

Note: Scheduled date & time will be determined after applications are received.