



Arrowhead United Way

Arrowhead United Way 2008-09 Request for Funding

APPLICATION INSTRUCTIONS

This instruction booklet is intended to guide you through the Arrowhead United Way (AUW) Funding Application. **Please read through all instructions carefully before completing the application.** Volunteers will be reviewing many applications, so accuracy and completeness throughout the process is very important.

After you have read this instruction booklet or at **any time** while you are completing the application, **feel free to call Rebecca Martin at the Arrowhead United Way office at (909) 884-9441 x223 if you have questions or need further assistance.**

REQUIRED TRAININGS: Attendance at a Bidders Conference and Outcomes Training session is required to be eligible to apply for AUW funding. Information regarding these trainings and the RSVP form are on the AUW website: www.arrowheadunitedway.org

Bidders Conferences will be a review of the AUW Funding Application and allow questions from agencies to be answered regarding the application and review process.

Outcomes Trainings will be to review the type of outcomes information that AUW will desire to be included in the Funding Application program descriptions. This is not a general outcomes training but is specific to AUW's desired outcomes and AUW's Funding Application form.

ALL APPLICATIONS via mail or delivery must be submitted by 4 p.m. on

Thursday, March 13, 2008 at:

AUW offices 646 North "D" Street,

San Bernardino, CA 92401.

LATE AND INCOMPLETE APPLICATIONS WILL NOT BE CONSIDERED FOR FUNDING!



GENERAL INFORMATION

The 2008-09 Arrowhead United Way (AUW) Funding Application represents the beginning of a new approach for AUW to fund programs in the community that target specific community issues approved by the Arrowhead United Way Community Impact Councils, Community Impact Cabinet and Arrowhead United Way Board of Directors.

It is the desire of AUW that through this process the funds raised by AUW will more than ever improve lives and make lasting community change. Accountability to our donors is the assurance that, agencies in which we invest our funds must be fiscally sound and managerially effective. It is to that end that this application and funding process was developed.

Deadline for ALL APPLICATIONS is by 4 p.m. on Thursday, March 13, 2008 at: AUW offices 646 North "D" Street, San Bernardino, CA 92401.

If your program(s) are selected for funding, funding will be for the period of July 1, 2008 through June 30, 2009, contingent upon the performance of the agency and agency programs. *Submission of an application does not guarantee funding.* Agencies must apply for funding for their own programs.

ACCESS TO THE APPLICATION

The 2008-09 funding application form, instructions and additional information are all available for download on the Arrowhead United Way website, www.arrowheadunitedway.org. Listed below are additional items available on the website that will be helpful when completing the application form. You may find it helpful to print these out and keep them handy when completing the forms.

- ***2008-09 Agency Funding Criteria***
- ***Arrowhead United Way Focus Areas & Outcomes***
- ***Required Trainings For Funding – RSVP Form***
- ***AUW 2008-09 Funding Calendar***

Getting Started

Begin by downloading the application form and saving the application form as your own document. It is recommended that after completing the first two pages that you save the document for each program you intend to apply for funding for. You can move through the document by using the tab key. The application forms are formatted as tables and text boxes. Simply use the tab or arrow key to move from cell to cell and type your information. For the program descriptions **it is preferred that you stay within the space provided.** Fonts should be already programmed in Arial or Times New Roman font, no smaller than 9pt.

Second it is recommended that once the files are saved for each program you should immediately insert the agency name and program name beginning on page 3 in the header of the document so this information will on each page. *(Double click on the header beginning on page 3 and use the tab button to move to the appropriate space to type in this information.)* This will clearly identify your program, should any pages become separated in the future. **You will need to resave this document for each program you are applying for funding for from AUW.** And, as always, remember to **SAVE FREQUENTLY!**

STEP BY STEP

These instructions will walk applicants through the application, page by page. It may be helpful to follow along, step by step, as you complete the application. The instructions may seem simple and repetitive for some of you, while others may need this information to complete this application.

The final step, once everything is completed is to make **10 sets of your request, 3-hole punched clipped not stapled (one with original signatures and 9 copies) per program.** The number of copies required also appears in the application form at the top of the signature page (Page 1). You will need to provide attachments as noted on page 11 of the application.

Cover Page – Important Note

ALL applications for the 2008-09 funding cycle are **due on or before the Thursday, March 13th @ 4:00 p.m.** Please make a note of this important date. As noted in the 2008-09 Agency Funding Criteria document, there are other requirements to receive AUW funding. Please review all information to be informed about other requirements.

You may view this information on the website www.arrowheadunitedway.org for further information and to download these documents.

Page 1 – 2008-09 Application Form / Signature Page

This page should be completed with the information requested. The top half of the page is fairly self-explanatory. Again, this is in a table format. Simply click in the appropriate cell of the table to enter the information requested.

Near the center of the page, you need to identify all of your agency's program(s) that are being submitted for funding. You will need to select one AUW Focus Area each of your programs will request funding from. You will find descriptions of these focus areas in the AUW Focus Areas & Outcomes document. The focus areas are:

- **Youth Services**
- **Family Services**
- **Basic Needs**

Choose **ONE** focus area that best fits each program. Many programs may overlap into more than one focus area; you will need to determine the most appropriate "best fit" based on the main focus of the program.

Once the entire application has been completed and reviewed, this page should be signed by the Executive Director of the Agency and Chief Volunteer Officer/ the Board Chair. These signatures acknowledge that all information in the application is true, accurate and complete. (One original and 9 copies need to be submitted for each program.)

Page 2 – Board Governance

This section mandates a concise description of the involvement and support of your agencies Board of Directors. Please answer the questions accurately.

Page 3 – Program Description

This page asks for a description of the program and its specifics. This is your opportunity to spell out how the program is going to address the needs of the clients and the conditions they face; please do this in a **clear and concise** manner. Provide days and hours of operation, an average number of times a client may receive services and any other information that will give a clear description of the program. Your description should provide a clear picture of what

services are provided to address the conditions the clients face (which you will identify on page 4), and how this program contributes to the community as well as the priorities identified by AUW.

***Abbreviated Examples:** 1) Staff creates relationships with area employers that are willing to mentor teens in job-training internships, screens program participants for current career interests, hobbies and life interests, places youth in appropriate, selective internships to increase their knowledge of various career opportunities in the community, and supervises internship matches on an ongoing basis. Ex. 2) staff and trained volunteers work directly with participants through a combination of one-on-one counseling sessions and small group meetings with families in similar situations. Progressive continuing education sessions and newsletters are delivered every two months that provide a vehicle for continued support and encouragement.)*

Page 4 – Client Population & Conditions

This information relates directly to client need. The description of information needed should clearly describe who this program serves and the conditions they experience (*Ex. 1: Youth ages 15 to 17. Ex. 2: Families earning \$35,000 per year or less.*) Spell out why your intervention is required and the scope of the problem being addressed (*Ex. 1: Statistically, 68% of high school graduates in AUW service area will move out of the area upon graduation. Ex. 2: Many of these families are lacking the skills necessary to manage credit and debt, or assess their own financial situation.*)

Page 4 – Program Evaluation & Improvement

One of the key purposes of measuring program outcomes is the ability to use the information gained to improve the program and its services to better meet the needs of its clients. Describe how the agency promotes continuous learning and how often program outcomes are reviewed. Explain how the data is used to improve program services.

Page 5 – Client Outcomes

You must identify one AUW focus area this program aligns with: Youth Services, Family Services or Basic Needs. Then provide *up to* three AUW outcomes that this program aligns with. The primary outcomes should come from the selected focus area but additional outcomes can cross over focus areas.

Proposed indicator of success: This is how you will determine if the targeted change for the client has occurred. Without some measurable verification, there is no evidence that the recipients are benefiting from your service. (*Ex. 1: Number/percent of youth that list more careers of interest to them at the end of the program than at the beginning of the program. Ex. 2: Number/percent of families that develop and utilize a spending plan, which includes savings and debt-reduction goals.*)

In order for a program to claim success in improving the lives of the people it serves, a measurable change in condition, status or behavior of the client must occur. Begin by considering what you want the individual to achieve or do differently as it relates to the focus area. Whenever possible, **define the desired outcome** in comparison terms of total AUW client population vs. those successfully achieving this result within a given time (*Ex. 1: 75% of 100 participating youth in AUW service area will develop expanded views of their career options. Ex. 2: 90% of 45 participating families will improve financial management skills and have increased financial stability.*)

Proposed Success Data: This will be the projected program results you will be tracking for the 2008-09 funding year. This should include the number and/or percent of clients projected to achieve the targeted outcome for 2008-09 funding year *Example 1) During the period of 7/1/08 to 6/30/09, it is anticipated that of the 43 families participating, 34 (79%) will be able to develop and utilize a spending plan, successfully reduce debt and regularly deposit to savings.)*

Based on the most recent actual results achieved and the trends identified within the client population, **project the target outcome results** for the 2008-09 funding year (*Ex. 1: Since the results of this program have historically been fairly constant, it is anticipated that 75 youth will develop expanded views of their career options in the 7/08 to 6/09 program period. Ex. 2: With the addition of several new trained volunteers, it is anticipated that the number of families that will successful transition to financial stability will increase to at least 88% of families.)*

Current Success Data: What are the program results you are currently tracking, if any? This should be the number and/or percent of clients that have achieved the targeted outcome from 7/1/07 through 12/31/07. *Example 1) During this 6 month timeframe of the 85 youth participating, 64 (75%) listed more careers of interest to them at the end of the program than at the beginning of the program.*

Page 6 – Client Success Story

Give a detailed account of a particular success story that will provide volunteers with a clear picture of how the program has helped to improve someone's life. *(This narrative may also be used in AUW communications.)* You should describe the challenge(s) faced by the client, what intervention was required and subsequently provided, how long it took to achieve this level of success, and how the client is doing now. ***Please DO NOT use actual client names.***

Page 7 – Program Collaborations/Networking

Collaborations and networking are important to an agency in making their programs more efficient and effective by coordinating services and partnerships with other organizations. Bringing in expertise of other organizations will benefit the client and the agency. Describe any coordination of services with other agencies that help serve your clients or that your agency provides to other agencies clients.

Page 7 – Additional Budget Narrative

This page allows for clarification on specific line items on the program budget page 8. You should also provide explanation for any material changes in revenue or expenses. If AUW funding is used to leverage additional funds, please specify which funding source is leveraged and how it is matched. If AUW funding is new or continued for your agency please provide an explanation of how this funding impacts and or improves services for this program.

Page 8 – Program Budget

This page should reflect ONLY the expenses and revenues for the program addressed in this proposal. Current figures should reflect actual budgets for the July 1, 2007 – June 30, 2008, while “proposed” figures should reflect the anticipated expenses and revenues for the NEXT fiscal year of July 1, 2008 - June 30, 2009 with AUW funding. Here, when including the number of full time equivalents (FTE's), it should be ONLY those that are associated with this program.

Page 9 – Program Statistical Data

This page breaks down the individuals served by this program by age, sex, ethnicity, and income level. (Note: this should be unduplicated counts.) Additionally, you are asked to



comment briefly on any trends that have been identified within this population. This information provides a clear picture of who the program has served and if any changes are occurring within that population. This data will support an increase/decrease in client numbers projected on this page and page 10. This information should only be those clients served in AUW service area. (See the Zip Code Data page 10 for zip codes and cities.)

Page 10 – Zip Code Data

Cities and zip codes provided are those of AUW service area. The program information you submit will provide a basic picture of the geographic area served by the program and is a value in determining what areas may be underserved. List the unduplicated NUMBER of persons served during the period of July 1, 2007 through December 31, 2007 and projected for the 7/1/08 through the 6/30/09 funding year. Do not include information for areas outside of AUW service area.

Page 11 – Additional Attachments to Include

Ten copies of the current Board of Directors Roster and

Four sets of attachments are required PER AGENCY; not per program. DO NOT SUBMIT MULTIPLE COPIES OF THE ATTACHMENTS.

AUW may request additional documentation regarding your agency or program(s) during the application process and funding year.

This completes the instruction booklet for the 2008-09 Arrowhead United Way Funding Application. Feel free to contact Rebecca Martin @ the Arrowhead United Way office at (909) 884-9441 with any further questions.