



UNITED FOR OPPORTUNITY

LIVE UNITED



2017 Call for Partners Proposal Packet

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I. Important Information

Timeline

May 2017	Begin Orientation Sessions
May 3, 2017	Proposal & Resources available at www.ckodm.com/uwgreatercincinnati
May 8, 2017	Apricot opened for online proposal submission
June 9, 2017	Proposals due online by 5:00 p.m. EST
June/July 2017	Proposal review by UWGC staff and volunteers
August 2017	Engagement with agencies as needed to discuss specific proposal information
October 2017	Preliminary investment amounts released
November 2017	Engagement with agencies as needed to discuss funding conditions
December 2017	Final proposal acceptance and final investment amounts released
January 1, 2018	2018 Investment Cycle begins
February 2018	Learning Cohorts begin
2019	Strategies Across Incomes programs: Re-application for 2020-2021 funding
2019	Individuals Below 200% FPL programs: Renewal process for 2020-2021 funding
2019	New organizations and pilot programs: Renewal process for 2020-2021 funding

Proposal Technical Assistance

There are three paths for accessing technical assistance:

1) **Content Questions**

Submit content questions via email to: Investment@uwgc.org

If the question can be answered via email, it will be; however, if the question requires a conversation, a United Way staff person will contact you. **The deadline for submitting questions to be answered is Wednesday, June 7th, 2017 at 12:00 P.M. (Noon).**

2) **Proposal Online Form and Online System Questions**

For basic questions about accessing the Proposal and of the use of the online system, please contact Barb Bruser at barb.bruser@uwgc.org or 513/762-7150.

3) **Frequently Asked Questions Update**

Organizations are advised to check the FAQ Updates on the home page of Apricot each Friday up until the proposal due date. This ensures that all organizations have access to the same questions and answers. **No new FAQ updates will be posted after 12:00 P.M. on Wednesday, June 7th, 2017.**

United Way Learning Opportunities

Below is a list of several learning opportunities available to both currently funded UWGC agency partners and new agencies considering pursuing funding through the new investment process.

Title:	Introduction to United Way of Greater Cincinnati's 2017 Investment Process
Who should attend:	Staff members of organizations that are planning to pursue funding through the new integrated investment process. All sessions are the same.
Topics:	<ul style="list-style-type: none"> • Overview of the new integrated investment process • Key events and dates in the process • Important content and themes • Overview of the Proposal • Helpful hints
Dates & Times:	<p>Wednesday, May 3 from 1pm – 3pm @ UC East 1981 James E. Sauls Sr. Dr, Batavia, OH 45103 https://orientationsessionone.eventbrite.com</p> <p>Thursday, May 4 from 9am – 11am @ Lawrenceburg Public Library Central 150 Mary St, Lawrenceburg, IN 47025 https://orientationsessiontwo.eventbrite.com</p> <p>Monday, May 8 from 9am – 11am @ CBI Middletown 800 Lafayette Ave, Middletown, OH 45044 https://orientationsessionthree.eventbrite.com</p> <p>Monday, May 8 from 2:30pm – 4:30pm @ Fifth Third Convening Center 2400 Reading Road, Cincinnati, OH 45202 https://orientationsessionfour.eventbrite.com</p> <p>Wednesday, May 10 from 2:30pm – 4:30pm @ Fifth Third Convening Center 2400 Reading Road, Cincinnati, OH 45202 https://orientationsessionfive.eventbrite.com</p> <p>Thursday, May 11 from 8:30am – 10:30am @ Fifth Third Convening Center 2400 Reading Road, Cincinnati, OH 45202 https://orientationsessionsix.eventbrite.com</p>
Materials:	Provided at the Orientation Sessions
Special Note:	A staff person from each applying organization must attend at least one session. Session will be recorded for later reviewing.

United Way Learning Opportunities

Title:	Family-Centered Workshop
Purpose:	Exploration of Family-Centered Learning
Who should attend:	This optional workshop is for programs considering applying for Family-Centered Learning.
Topics:	This workshop is designed for several members of an organization to explore their program's opportunities for family-centered practice with coaching from United Way staff.
Dates & Times:	Monday, May 15 from 9 a.m. to 11 a.m. @ Fifth Third Convening Center https://familycenteredsessionone.eventbrite.com Wednesday, May 17 from 2 p.m. to 4 p.m. @ Fifth Third Convening Center https://familycenteredsessiontwo.eventbrite.com
Materials:	There may be some pre-work. Additional materials will be provided at the workshop.
Special Note:	This interactive session will not be recorded, but materials will be available for anyone who is unable to attend.

Title:	United Way Outcome & Logic Model Basics
Who should attend:	This optional training opportunity is for agencies that are 1) not current United Way partners or 2) current United Way partners that have new staff working directly with the investment process.
Topics:	<ul style="list-style-type: none"> • Use of the logic model • Outcome measurement • Frequently used terms • Other reporting requirements for United Way
Dates & Times:	Tuesday, May 16 from 8:00am – 9:30am @ Fifth Third Convening Center 2400 Reading Road, Cincinnati, OH 45202 https://uwgcbasicssessionone.eventbrite.com Wednesday, May 17 from 3:00pm – 4:30pm @ Fifth Third Convening Center 2400 Reading Road, Cincinnati, OH 45202 https://uwgcbasicssessiontwo.eventbrite.com
Materials:	Provided at the Session

Applicant Eligibility

This proposal process is open to any nonprofit organization in the region that believes its program aligns with the United Way Opportunity Agenda criteria. Nonprofit organizations do not need to be physically located in the 10-County region¹, but do need to show how their services are provided to residents of the service area.

New Organization Eligibility Requirements

Organizations not currently funded by United Way are required to submit the following documents:

- A. Letter of exemption from federal income tax under Section 501(c)(3) or exemption from taxation under another section of the Internal Revenue Code
- B. A copy of the most recent annual certified audit or financial statements
- C. Most recently filed IRS Form 990

Funding Decisions

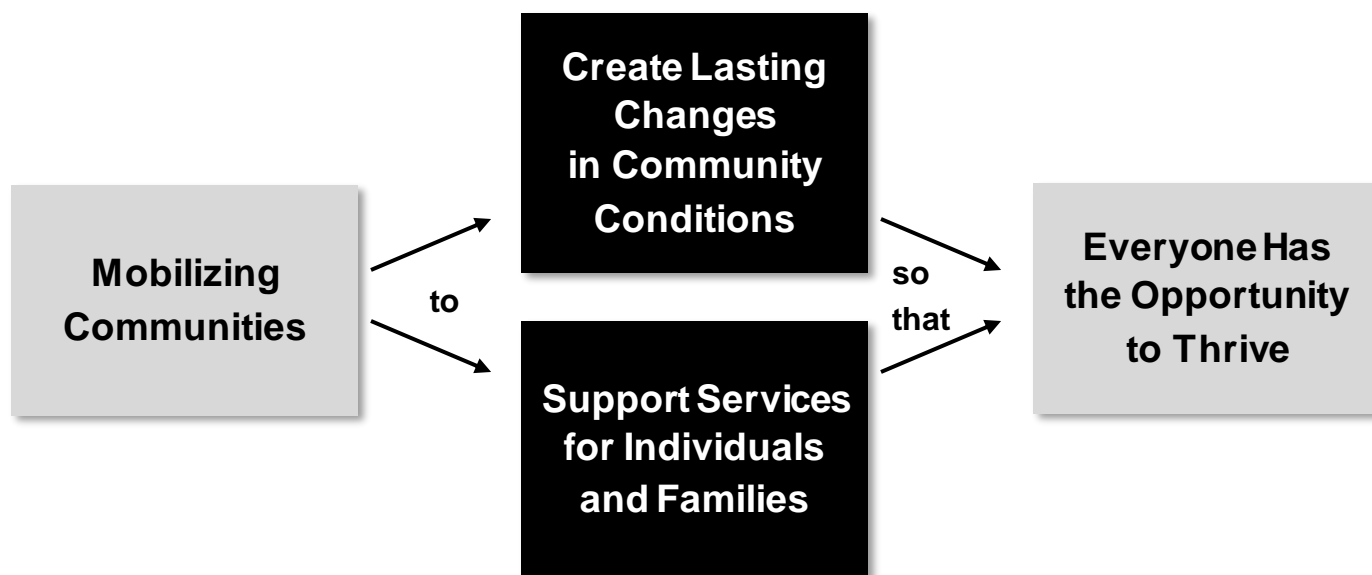
United Way of Greater Cincinnati is committed to conducting a transparent and competitive investment process:

- A. United Way may elect not to fund or advance any applicants with known management, fiscal, reporting, program or other problems that make it unlikely they would be able to provide effective services.
- B. All funding decisions are made at the discretion of United Way of Greater Cincinnati's Board of Directors based on recommendations of community volunteers and staff.
- C. Qualification under the eligibility and funding criteria requirements does not entitle an organization to receive funding.
- D. United Way reserves the right to reject any and all proposals, in part or in whole, to negotiate with applicant(s) and to award funding to those programs deemed most likely to contribute to the goals of the Opportunity Agenda.
- E. All United Way investments are contingent on the results of the Annual Campaign.
- F. United Way Board of Directors may determine at any time to reduce or end investment in a program that is not meeting its impact, alignment or accountability standards.

¹ United Way of Greater Cincinnati's regional service community is comprised of Boone, Campbell, Grant and Kenton counties in Kentucky; Dearborn and Ohio counties in Indiana; Brown, Clermont and Hamilton Counties in Ohio and the Middletown area (cities of Middletown, Monroe and Trenton and the townships of Lemon, Liberty, Madison, St. Clair and Wayne) in Butler County, Ohio.

II. United for Opportunity

United Way's vision is for Greater Cincinnati to be a region where everyone has the opportunity to thrive. Because no single organization or sector can achieve this vision, United Way of Greater Cincinnati implemented a new model in 2007 focused on mobilizing diverse resources and partnerships. Our partners include nonprofit human service agencies, schools, government policy-makers and bodies, businesses, voluntary associations, the faith community, and others working together to change the conditions to improve the lives not just of program clients, but of community populations. This is what we call community impact:

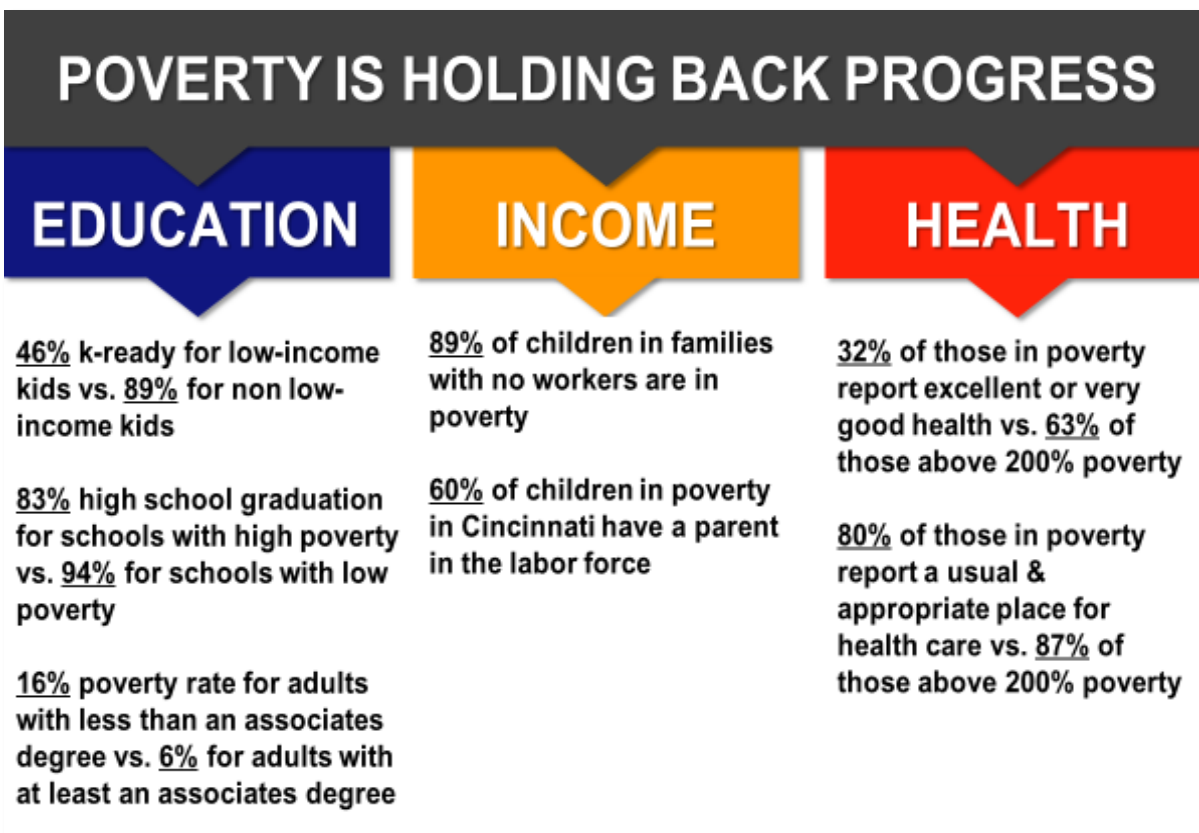


In 2011, to measure progress toward this vision, we led the adoption of the Bold Goals for Our Region with specific targets to achieve by 2020.



Our community has made significant progress toward achieving the Bold Goals, but poverty is holding us back. More than 600,000 people in our region are struggling. Some are homeless or hungry. Most are working, yet they still can't make ends meet. Many are only one crisis away from disaster – a job loss or major illness could propel them into poverty.

Although one in three people are affected, it can be difficult to see those who need help. Poverty is growing fastest in our suburbs and rural areas. Nearly 200,000 children are suffering at a time that is most critical in their development for lifetime success. In many of our neighborhoods, it is the common experience for a child to grow up in a household that struggles to get by. We believe that we must change this trajectory of generational poverty if we are to make faster and more equitable progress toward meeting the Bold Goals.



It's Time for a New Approach

Many local efforts are in place to help struggling families meet basic needs and achieve self-sufficiency. Although we know there are success stories, poverty rates have remained essentially unchanged for years. Many families in poverty are trapped by institutional forces rooted in inequity, as well as a maze of processes and requirements that reinforce barriers to their success.

We believe that a family-centered approach would help dismantle these barriers. Being family-centered begins with valuing family members' ability to set their own goals and make decisions in their own best interest. While many organizations focus on particular aspects of a participant's life — such as financial stability or child developmental outcomes — a family-centered approach aims to bring all aspects together.

Our current fragmented system has grown over many years. To develop more integrated solutions for families, new partnerships must be formed and new strategies adopted. United Way is committed to lead these changes so that more families reach self-sufficiency and have the opportunity to thrive.

In 2016, the United Way Board of Directors adopted a new United for Opportunity Agenda 1.0 to establish our guiding principles, priorities and strategies. We have labeled this version 1.0 because we know changes will happen over time as we learn with community partners. Please see the Appendix for an overview.

New Priority Populations

Poverty is often a cycle affecting multiple generations. Breaking this cycle requires focusing on the whole family – adults must have gainful employment and children must succeed in school. All members of a family, which may include grandparents and other supportive adults, must also have good health as a foundation for success.

To emphasize our commitment to the family-centered approach, we will prioritize helping families with incomes below self-sufficiency levels, defined as at or below 200% of the Federal Poverty Level (FPL). Our first priority is families with children under 6. Families with young children have the highest poverty rates in our region, during a time that is most important for child development.

Our second priority population is families with children ages 6 to 24. Our third priority is to support important strategies that focus on individuals with incomes below 200% FPL. The United Way Board of Directors has committed that between 80% to 90% of 2018 discretionary investments will be directed to programs that align with these three priority populations.

Strategies Across Incomes

We recognize the importance of continuing to address strategies that affect people of all incomes in our region. The United Way Board of Directors has committed between 10% to 20% of 2018 discretionary investment in programs that align to the Strategies Across Incomes investment track. These programs demonstrate strong alignment to supporting United Way strategies, but are unable to collect participant income data or do not intentionally focus on people with incomes below 200% FPL. Programs that choose to apply for the Strategies Across Incomes track will complete a simplified proposal focused on program design, results and learning.

Build Strong, Family-Centered Communities

Research has shown that neighborhoods play an important role in supporting the well-being of families. Living in communities with high concentrations of poverty affects both the quality of daily life and the long-term success of parents and children. Strong communities with deep social ties and access to housing, services, businesses, and employment can provide a foundation for families to move out of poverty. United Way will continue to invest in strategies that support the development of strong, family-centered communities, and is working with the Community Building Institute, LISC Greater Cincinnati & Northern Kentucky, neighborhood partners and residents to identify new opportunities for place-based solutions. As these develop, we will connect with United Way agency partners to explore further collaboration.

Investing in Family-Centered Partnerships

United Way will structure our investments to incentivize and support our commitment that more families have the opportunity to thrive. We seek to fund programs, services and collaboratives that focus on our priority populations and are ready to learn to expand family-centered practices within and across organizations. In

addition to investing in core services, United Way will provide capacity support for learning and improvement. We will simplify our process and incorporate the flexibility to shift as we learn more about what works.

We will know we have succeeded in the long-term when strong partnerships across our region are able to respond seamlessly to the complex needs of families and the cycle of poverty is broken.

Address System-Level Barriers & Disparities

We believe we can help more families through family-centered services. However, we know that to truly impact the poverty rates in our region, we must also focus on system-level barriers such as disincentives to work or lack of transportation to job centers. United Way is committed to work with our community stakeholders to advocate for more family-centered policies and practices and to support more equity in our community. We define equity as the fair and just inclusion where all can participate and thrive. In our work to achieve the Bold Goals, we recognize that disparities by race, class, and gender are the most pronounced and, thus, requires that we intentionally focus resources on those with the greatest need.

Outcomes Measurement & Outcomes-Based Funding

The measuring and reporting of results are required to determine the effectiveness of any program in meeting the goals of the Opportunity Agenda and the Bold Goals for Our Region. In addition, United Way uses these results to assess community and program-level impact, demonstrate accountability and make investment decisions. Outcomes measurement helps partners improve their services, raise funds, recruit volunteers, and maintain credibility.

Partners are responsible for implementing and managing a useful, feasible, timely, and accurate outcomes measurement system. Data are to be used for reporting results to United Way and for improving program design. Programs are evaluated based on the following: achievement toward the proposed outcomes; the ability to report required data and provide thoughtful and meaningful comments on the results achieved; and the implementation of continuous improvements based on results.

United Way's Outcome Measurement Philosophy

Outcomes measurement not only evaluates the impact we have in the community, but also guides continuous learning and improvement.

Agency/community partners are expected to:

- a) Conduct program-level outcomes measurement that examines the services provided and the impact of those services on clients
- b) Summarize and analyze evaluation data for use in improving program quality and results for participants
- c) Report results and learnings of their outcomes measurement to United Way within the stated timeframes and in the requested manner

Learning for Improvement

Implementing a family-centered approach will not be easy. We are stuck in a system that reinforces fragmentation and barriers. To achieve our vision, United Way and community stakeholders at all levels will

need to learn new practices and policies. Change may be difficult and slow at times, but we are committed to adopting a learning approach into all that we do, including:

- Creating space for innovation, testing new ideas and letting go of ineffective practices
- Involving diverse expertise, especially valuing leadership from those most affected by poverty
- Building more collaborative partnerships across sectors so that government, social services, communities and business are building solutions for families together
- Intentionally capturing and responding to what we learn by using quality improvement models, human-centered design, continuous feedback and other learning methods

III. Call for Partners: Multi-Track Investment Overview & Criteria

To support the new Opportunity Agenda, United Way of Greater Cincinnati is conducting a Call for Partners process in 2017 to determine funding investments for 2018. Three investment tracks have been developed based on the priority populations and the focus on family-centered practice. After reviewing the information provided in this document, programs can choose to apply for one of three investment tracks:

Family-Centered Learning

Programs that align with United Way strategies; intentionally focus on people with incomes below 200% FPL; and are ready to participate in family-centered learning practices.

Individual Adults or Children

Programs that align with United Way strategies and intentionally focus on either adults or children with incomes below 200% FPL.

Strategies Across Incomes

Programs that align with United Way strategies, but focus on participants of all incomes.

For the purposes of this process, “program” is defined as a set of activities, strategies or services to impact a set of outcomes. This term may incorporate a single program, wrap-around services provided by one organization, or a multi-partner collaborative.

Key Principles

The following key principles will guide United Way investment decisions: Impact, Alignment, Accountability & Learning. These principles vary, depending on the investment track.

Key Principles Per Investment Track	Priority Populations		Strategies Across Incomes
	Family Centered Learning	Individuals Below 200% FPL	
Alignment: Supports UWGC strategies	✓	✓	✓
Alignment: Intentional focus on people in poverty	✓	✓	
Impact: Achieves measurable change in lives and community	✓	✓	✓
Accountability: Effective, efficient & quality operations	✓	✓	✓
Learning: Incorporates continuous learning processes	✓	✓	✓
Learning: Committed to learning to improve family-centered practice	✓		

Investment Track Descriptions & Eligibility

Current United Way agency partners may submit proposals for any current UWGC-funded programs. Agency partners may also choose to reposition any current UWGC-funded program(s) as a wrap-around service, defined as a set of activities, strategies or services provided by one organization that benefits the same population. We believe that this option would enable some organizations to better demonstrate the breadth of services provided, as well as reduce the number of United Way proposals and reports required.

Current United Way agency partners may also submit proposals for two programs that are not currently funded by UWGC. These programs can align with any investment track.

New organizations may submit up to two proposals for the Family-Centered Learning track as shown below:

Eligibility to Apply Per Investment Track		Number of Proposals Allowed	Family Centered Learning	Individuals Below 200% FPL	Strategies Across Incomes
Current United Way Agency Partner	All currently-funded United Way programs	No Limit	✓	✓	✓
	Wrap-around services that reposition a currently-funded United Way program	No Limit	✓	✓	✓
	Existing programs not currently funded by United Way	No More Than a Total of Two	✓	✓	✓
	Multi-Generation pilot program		✓		
New Applicant	Any existing program, wrap around services or collaborative	No More Than a Total of Two	✓		
	Multi-Generation pilot program		✓		

Priority Populations

United Way has set a priority to intentionally focus on improving outcomes for people with incomes below 200% FPL. We want to challenge ourselves, our partners and our community to think differently about how we address poverty. To us, an intentional focus is more than serving people with lower incomes. Programs intentionally focus on these populations when they intentionally seek out people with incomes below 200% FPL and when they deliberately consider how to meet their diverse needs.

We do not expect our partners to stop serving people of all incomes. We recognize the importance of mixed-income programs for a variety of reasons, and have not set a specific requirement for how many people with incomes below 200% FPL must be served to be eligible for the Priority Populations tracks. However, we do want to know how programs are working to ensure that their participants with lower incomes are achieving equitable outcomes.

Programs can demonstrate intentional focus on people with incomes below 200% FPL with qualitative and quantitative data:

➤ Intentional Focus on People with Incomes Below 200% FPL

United Way highly prefers those programs that can demonstrate current efforts to intentionally focus on people with incomes below 200% FPL. We will also consider funding programs in the Priority Populations tracks that have specific plans for increasing their intentional focus on these populations.

Examples of intentional focus for priority populations may include:

- Income requirement or reserving slots for a percentage of participants with low incomes
- Specific recruitment and outreach of participants with low incomes
- Location of services in high-poverty areas that includes community outreach & partnerships
- Involving participants in co-designing solutions
- Program design specifically addresses the strengths and challenges of participants with low incomes
- External partnerships address needs of participants with low incomes
- Advocacy and other systems-level efforts to remove barriers and improve policy & practice that benefit the priority populations
- Other deliberate activities are designed to improve outcomes for participants with low incomes

➤ Quantitative Participant Income Data

Ideally, programs would collect 100% of household income data for all participants. However, United Way recognizes that some programs cannot collect this level of data. In these cases, programs can use proxy or estimated data as described below, with the expectation that the quality of income data collected for participants will improve over time. Programs can also provide more detail about plans to track income data.

- Direct: Known household income & size allows calculation of Federal Poverty Level
- Proxy: Known individual income, certified homeless or known recipient of other benefits that require income below 200% FPL

- Estimated: Data based on known poverty rate of average population. For example, using the free/reduced lunch percentage at a school to estimate the number of program participants with low incomes.

Assessing Alignment with Priority Populations	Priority Populations	Strategies Across Incomes
Serve some people with incomes below 200% FPL	✓	Maybe
Support strategies that may benefit people with low incomes	✓	Maybe
Collect participant income data (direct, proxy or estimated)	✓	Maybe
Intentional focus on people with incomes below 200% FPL	✓	

Priorities 1 & 2: Family-Centered Learning

Program Eligibility:

- Support for United Way strategies
- Intentionally focus on individuals below 200% FPL
- Serve children or adults in a family, defined as “children and the adults in their lives”
- Are ready to participate in Family-Centered Learning

Programs that meet the following criteria are highly encouraged to apply:

- Primarily serve children under age 6
- Primarily serve children ages 6-24
- Serve a significant number of adults who are connected with children under age 25

Investment Period:

4-year funding commitment (2018-2021):

- Current United Way funded partner agencies

2-year funding (2018-2019) commitment with opportunity for renewal for 2020-2021:

- New agencies with established programs
- Current or new agency pilot programs

Family-Centered Learning Review Criteria:

- Alignment:
 - Demonstrate alignment to UWGC strategies
 - Select at least one strategy and one UWGC measure
 - Collect participant income data or clear plan to collect income data starting in 2018
 - Intentionally focused on individuals below 200% FPL

- Impact
 - Demonstrate history of strong results for selected strategy
 - Provide clear case for how services lead to measurable change for target population
 - Demonstrate continuous learning processes
- Accountability
 - Capacity to meet all UWGC partner agency & Family-Centered Learning requirements
 - Current agency partners: Past performance
- Learning
 - Ready to innovate, test and adopt family-centered practices
 - Ready to use methods such as quality improvement & human-centered design
 - Ready to work collaboratively within organization and across organizations
 - Ready to develop strong community connections and incorporate the leadership and voice of participants and stakeholders

Priority 3: Individuals with Incomes Below 200% FPL

Program Eligibility:

- Support for United Way strategies
- Intentionally focus on individuals below 200% FPL
- Focus on one service or one generation only
- Program model is not favorable for family-centered practice

Investment Period:

Programs in the Individuals Below 200% FPL track will be offered a two-year investment commitment, with the opportunity for renewal for 2020-2021.

Individuals Below 200% FPL Review Criteria:

- Alignment:
 - Demonstrate alignment to UWGC strategies
 - Select at least one strategy and one UWGC measure
 - Collect participant income data or clear plan to collect income data starting in 2018
 - Intentionally focuses on individuals below 200% FPL
- Impact
 - Demonstrate history of strong results for selected strategy
 - Provide clear case for how services lead to measurable change for target population

- Incorporate continuous learning processes
- Accountability
 - Capacity to meet all UWGC partner agency requirements
 - Current agency partners: Past performance
- Learning
 - Incorporate continuous learning processes

Strategies Across Incomes

United Way will continue significant investment in programs that provide support for income, education and health strategies, but do not intentionally focus on people with incomes below 200% FPL.

Program Eligibility:

- Support for United Way strategies

Investment Period:

Programs in the Strategies Across Incomes track will be offered a two-year investment commitment, with the opportunity to re-apply for investment for 2020-2021.

Strategies Across Incomes Review Criteria:

- Alignment:
 - Demonstrate alignment to UWGC strategies
 - Select at least one strategy and one UWGC measure
- Impact
 - Demonstrate history of strong results for selected strategy
 - Provide clear case for how services lead to measurable change for target population
 - Incorporate continuous learning processes
- Accountability
 - Capacity to meet all UWGC partner agency requirements
 - Current agency partners: Past performance

IV. Family-Centered Learning Description

United Way expects that all partners in the Family-Centered Learning track will be committed to improving outcomes for families in poverty and reducing systemic barriers. However, all partners are not expected to start at the same place. Three learning cohorts have been designed with different levels of intensity and requirements.

Each funded organization is required to participate in at least one learning cohort. Organizations with multiple Family-Centered Learning funded programs can choose to participate in more than one learning cohort if they prefer.

The information provided in this document is intended to help programs decide which cohort best meets their needs. United Way has intentionally not developed details about how each cohort will operate or areas of focus because the cohort partners will work with us to shape the learning agenda. We will hold ourselves accountable for ensuring that partners find value in the learning activities.

Long-Term Success and Progress Measures

Overall success will be improved outcomes for the families directly served by programs and an improved system that benefits all families in poverty. Recognizing that there will not be instant results, we are making a long-term commitment to build the necessary learning and capacity in our community. In the interim, family-centered partners will co-design progress measures to track learning and outcomes, as well as report the value of this work to all stakeholders. As a result, we anticipate that traditional United Way program monitoring requirements will be reduced.

In 2016, United Way invested in a new United Way Integrated Data System & Warehouse that offers increased capacity to track individual and family outcomes within and across organizations. This system replaces several United Way-supported shared early childhood and workforce databases. We anticipate that family-centered partners will co-design additional opportunities to use this tool to track progress.

Family Centered Opportunity Fund

Recognizing the importance of increasing partner capacity to adopt family-centered practice, United Way has established a Family Centered Opportunity Fund to support innovation, collaboration, and partner capacity to advance family-centered approaches, programs and systems. Starting in 2018, partners in the Family-Centered Learning track will have the opportunity to apply for small, one-time capacity grants to support their learning as well as benefit from other capacity-building opportunities.

Requirements for Family-Centered Learning

All programs in the Family-Centered Learning track must be committed to meet the following requirements:

- Family-centered foundational learning
- Systemic change activities
- At least one family-centered cohort

United Way's core initiatives and additional community stakeholders and organizations will also participate in Family-Centered Learning. Below, we have included some initial two-year progress measures to be developed with partners.

United Way is committed to making learning opportunities available throughout our 10-county region. Partners in our Area Communities will work with United Way to design learning opportunities that meet their local needs and are convenient to their location. United Way will also take advantage of webinar/remote learning when possible.

Through the proposal process, organizations will assess their readiness and capacity for learning, and make an initial selection for which learning cohort they are best suited. Not all organizations may get their first selection, adjustments may be made by United Way. If United Way has a preference to adjust a cohort, we will initiate a conversation during agency engagement discussions in August.

A. Family-Centered Foundational Learning

All Family-Centered partners will participate in foundational learning opportunities provided through trainings, workshops, webinars, national speakers, etc. These learning opportunities will be designed by the partners to best meet their needs. Topics may include human-centered design, behavioral science, improvement science, closed feedback loops, community engagement, building partnerships, etc.

Foundational Learning Two-Year Progress Measure: UWGC & partners demonstrate improved knowledge of family-centered practice.

B. Systemic Change & Advocacy

All Family-Centered partners will participate in collective efforts to address system-level practices and policies that create barriers for families to move out of poverty. Partners will identify opportunities to advocate for policy or practice change. We will then work together with community stakeholders to develop advocacy strategies, inform boards and constituents of the issues, and build community will for systemic change.

Systemic Change Two-Year Progress Measure: UWGC & partners demonstrate that constituents increase support for advocacy efforts to remove barriers for families to move out of poverty.

C. Commit to Participate in One or More Learning Cohorts & Meet Requirements

All Family-Centered organizations will participate in at least one learning cohort and meet the cohort requirements as described below. Cohort members will co-design learning objectives with United Way staff who will also provide capacity-building, coaching, logistics, facilitation, research and evaluation support.

Cohort Two-Year Progress Measures: UWGC & partners fully participate and meet learning cohort requirements. UWGC & partners develop learning portfolios that track progress over time, including organizational change, new collaborations, testing new practices and achieving results for families.

1) Develop Family-Centered Practice Cohort

This cohort is designed for organizations that want to learn how to get started. They may have experience and expertise in some areas of family-centered practice, but recognize that there are other areas that need to be developed. The initial learning focus will be identifying opportunities and overcoming internal organizational barriers to family-centered practice. Cohort members will learn more about applying human-centered design, behavioral science, improvement models, etc.

➤ Develop Family-Centered Practice Cohort Requirements

- Quarterly cohort meetings (face to face, or potentially through online meetings)

- At least two representatives from each organization engaged
- Accountable for gathering insights, developing and implementing organizational learning plan with small tests of change
- Bi-annual check-ins with CEO and Board Chair
- Incorporate opportunities to include family voice, leadership and decision-making

2) Improve Family-Centered Practice Learning Network

This cohort is designed to start with 5 to 10 organizations that are committed to improvement science and start making changes. Participants may have significant experience in family-centered practice or multi-generation services, but this is not required.

Because of the additional time requirements for this cohort, United Way will provide a one-year stipend (amount TBD) to each partner organization participating in the cohort. The biggest time commitment will be in the first year as an organization learns to adopt improvement science methodology. Other family-centered partner organizations will have an annual opportunity to apply to join this cohort and earn a stipend.

Cohort members will function as a learning network with goals to: 1) adopt a well-specified aim; 2) develop a deep understanding of the problem, the system that produces it, and a theory of improvement relevant to it; 3) use the rigor of improvement science; and 4) accelerate the development, testing and refinement of family-centered interventions and their effective integration into practice across varied contexts.

➤ Improve Family-Centered Practice Cohort Requirements

- Establish an improvement project team of 2 to 5 people, with an identified team lead.
- Attend improvement science training (a half-day, at minimum) to be trained in the Model for Improvement and the associated tools and techniques.
- Set an actionable project goal; track frequent data related to the goal; and implement weekly tests of change to learn and improve results.
- Huddle weekly to review data, discuss learnings, plan tests and maintain project momentum.
- Meet at least every other week with an improvement coach (format flexible, face to face or phone). Coaching may be more frequent at the onset of improvement projects.
- Project team leader, at minimum, attends monthly meetings of the full Learning Network (face to face, or potentially test video meetings).
- Share data through United Way Integrated Data System & Warehouse; commitment to improve data collection & analysis.
- Incorporate closed feedback loops, co-design and other opportunities to include families.
- Sharing learnings with other UWGC partners and community stakeholders.

3) Strengthen Multi-Generation Partnerships Cohort

This cohort is designed for organizations with existing multi-generation programs or strong plans to pilot a multi-generation program. The focus will be incorporating peer learning to improve best practices; address disparities; increase community voice and strengthen multi-generation partnerships. Multi-generation programs provide intentional services for at least two generations, either within the organization or through seamless partnerships. Outcomes are tracked for the adults, children and family.

➤ Strengthen Multi-Generation Partnerships Cohort Requirements

- Develop shared peer learning plan and measures
- Shared data uploaded through the UWGC Warehouse and a commitment to track family financial stability over time
- At least two staff assigned to regularly participate in cohort activities including a minimum of bi-monthly meetings
- Bi-annual check-ins with CEO and Board Chair
- Providing members of all learning cohorts opportunities to observe multi-generation practices, such as learning walks
- Incorporating closed feedback loops, co-design and other opportunities to include families
- Pilot projects will have additional monitoring/check-ins with UWGC to evaluate progress
- Commit to applying learnings from the cohort into actionable steps in the field of practice

Readiness Self-Assessment for Family-Centered Learning

This readiness self-assessment has been developed to help organizations determine for themselves if they are ready to participate in family-centered learning and which cohort might be the best fit. The categories represent the continuum of readiness for family-centered practice. Programs will not submit their results, but could use this as guide for answering proposal questions. Currently-funded programs that decide that they are not yet ready for family-centered learning should apply for one of the other investment tracks, but will have opportunities to continue to assess their readiness to participate in the future.

	Not Yet Ready	Focus on Families Below 200% FPL		
		Develop Cohort	Improve Cohort	Multi-Gen Cohort
Organization Commitment	Leadership is unaware of or does not currently support implementing family-centered practice	Leadership supports family-centered practice, but hasn't yet implemented necessary supports or tools	Leadership supports family-centered practice and is ready to commit significant resources toward implementation	Leadership embraces whole family approaches and has made it a priority by providing supports and tools to implement

Services	Prefers to focus on either adult-only or child-only, and provides services and referrals for that adult or child only	Ready to test family-centered practices and explore new partnerships	Focuses on whole family goals, ready to implement family-centered services and partnerships	Provides intentional services for multi-generations either within organization or through seamless partnerships
Data	Not ready to collect whole family data and/or share data across departments or partners.	Ready to test new practices for reviewing and sharing family data across departments or with partners	Ready to implement new evaluation methods to measure family outcomes	Some outcomes for both adult, child and family are tracked and reviewed regularly
Learning-Oriented & Innovation	Not yet ready to deepen understanding of family needs and goals and adapt practice based on insights.	Open to learning and willing to try new things. Ready to deepen understanding of family needs and goals and adapt practice based on insights. Open to sharing and learning from peers.	Ready to incorporate rapid improvement, including weekly testing and measurement. Ready to deepen understanding of family needs and goals and include families in the improvement process. Willing to share successes and failures with others.	Willing to share best practice, learnings and failures with others as well as learn from others' experiences. Ready to deepen understanding of family needs and goals. Ready to explore human-centered design and co-create solutions with families.
Continuous Improvement	Not yet ready to expand improvement science practices	Organization has a defined process for continuous improvement and organizational leaders are knowledgeable about the process.	Organization has a defined process for continuous improvement. Key organization and program leaders understand the process and apply it at least occasionally into program practice or special projects.	Organization has a defined process for continuous improvement. Key organization and program leaders are knowledgeable about the process and apply it routinely within program practice.
Collaboration	Not yet ready to explore new partnerships across strategy areas & generations	Open to exploring new partnerships across strategy areas & generations	Open to developing new partnerships across strategy areas & generations	Committed to strengthening established partnerships across strategy areas & generations
Community Participation	Not ready to involve families in decision-making and leadership	Open to involving families in decision-making and leadership; open to testing new feedback mechanisms	Ready to implement changes that involve families in decision-making and leadership and implementing new feedback mechanisms	Ready to explore making family/parent the driver of the work together; strength-based focus; open to testing new feedback mechanisms

Commitment to Equity	Unaware of systemic drivers of inequity and/or not yet ready to implement practices and policies to address disparities	Aware of systemic drivers of inequity. Ready to implement organizational practices and policies and approach to address disparities	Aware of systemic drivers of inequity. Ready to implement organizational practices and policies and approach to address disparities	Aware of systemic drivers of inequity. Ready to implement organizational practices and policies and approach to address disparities
Systemic Change	Not yet ready to support systemic-change advocacy efforts	Ready to educate constituents and build community will for systemic-change advocacy efforts	Ready to educate constituents and build community will for systemic-change advocacy efforts	Ready to educate constituents and build community will for systemic-change advocacy efforts
Capacity to Meet Cohort Requirements	Not yet ready to provide the staff time and resources needed to participate in Family-Centered Learning	Two organization representatives attend quarterly meetings; implement learning plan	2-4 member project team with frequent coaching, meetings and weekly measurement and testing	Two staff attend bi-monthly meetings; implement learning plan including actionable steps to apply learnings between meetings

V. Strategies, Funding Requirements & Measures

These strategies represent important education, income and health milestones that evidence suggests are critical for everyone in our region to have the opportunity to thrive. Programs in all investment tracks must demonstrate alignment with one or more of these strategies and choose at least one performance measure.

United Way has prioritized key strategies and measures (in bold) that we believe will accelerate progress and represent investment priorities. See the Appendix for a Cycle of Opportunity diagram that shows the integration of these strategies and measures.

United for Opportunity Agenda Strategies
1. Prenatal & Maternal Health Care
2. Home Visiting
3. Family Engagement
4. Quality Early Care & Education
5. Academic & Social-Emotional Skill Building
6. Career Preparation
7. Post-Secondary Education & Training
8. Basic Needs & Housing
9. Work Supports, Financial Literacy & Asset Building
10. Employment & Career Pathways
11. Address Trauma & Build Resiliency
12. Building Healthy Behaviors
13. Maintain Physical & Mental Health

Funding Requirements

Some strategies have specific funding requirements and/or required performance measures, as described in this section. Programs applying for these strategy areas must meet the requirements.

CHILDREN HAVE A STRONG START

STRATEGY 2. HOME VISITING

All home visiting programs supported by United Way must:

- Meet the evidence-based criteria of the federal Maternal, Infant, Early Childhood Home Visiting (MIECHV) program **OR** Provide in-home summer learning opportunities to children and families proven to measurably improve children's readiness for kindergarten

AND

- Use child-centered screening and/or assessment tools

AND

- Include transition planning within the program and to other quality programs or kindergarten upon completion or termination

Home Visiting programs, with the exception of summer learning opportunities, must use the following performance measures:

- Children participating in minimum of six months demonstrate progress in social/emotional development
- Children participating in minimum of six months demonstrate progress in cognitive and language development

STRATEGY 3. FAMILY ENGAGEMENT

The following requirements only apply to family engagement programs that primarily serve families with children under age 6:

- Use curriculum and materials that contribute to kindergarten readiness
- Engage families in ways that meet their specific needs and culture – hours, location, format, language
- Use screening and assessment tools that measure children's development, progress, and/or kindergarten readiness
- Include parent/caregiver outcomes that measure their readiness to support their children's education

Family Engagement programs that primarily serve families with children under age 6 must use the following performance measures:

- Parents/caregivers show increase in their understanding to support their children's development
- Parents/caregivers show increase in their ability to support their children's development

STRATEGY 4. QUALITY EARLY CARE AND EDUCATION

Quality Early Care and Education programs supported by United Way are required to:

- Adhere to quality standards as described below
- Use child-centered screening and/or assessment tools
- Use performance measures listed below

Quality Standards for Early Care and Education

Early care and education programs must adhere to the standards as defined in the chart below. Programs must meet the standards no later than October 31, 2017. Adjustments may occur during the investment cycle to align with state guidelines and revisions.

OHIO	KENTUCKY	INDIANA
▪ 3 Stars from Step Up To Quality	▪ 3 Stars from STARS for KIDS NOW	▪ Level 3 from Paths to QUALITY

Quality Early Care and Education Programs must use the following performance measures:

- Children participating in minimum of six months demonstrate progress in social/emotional development
- Children participating in minimum of six months demonstrate progress in cognitive and language development

Quality Early Childhood Professional Development programs supported by United Way are required to:

- Use curriculum and assessment tools that align to state quality rating systems; include individual and/or program outcomes in addition to outputs and, as much as possible, outputs should be unduplicated
- Upon request, participate in Success By 6 affinity groups and/or common early childhood data systems

Professional development programs funded by United Way must use the following performance measure:

- Programs and providers engaged in ongoing professional development will attain or have plans to attain higher quality ratings

YOUTH ARE PREPARED FOR SUCCESS

Funding Requirements

STRATEGY 5. ACADEMIC & SOCIAL-EMOTIONAL SKILL BUILDING

Programs Offering Services in Cincinnati Public Schools

United Way of Greater Cincinnati has long been a champion and proponent of the Cincinnati Public School district.

United Way expects all agency partners in Cincinnati Public Schools to demonstrate the ability to engage their customers, and include children/families/schools in the design of services. Over the course of the investment cycle, funded partners may be asked to adapt services to meet the interests of the district's priority outcomes, the needs of the students and community members. United Way encourages a flexible approach to services when possible and reserves the right to require changes in delivery at any time. We particularly appreciate when partners adjust services to extend programming into the summer.

Collecting Academic / Post-Secondary Data from School Partners

United Way expects programs to demonstrate a strong working relationship with schools (e.g. shared database, shared partnership agreements, etc.). Particularly, afterschool programs that offer services on a school site should demonstrate strong alignment to the academic standards outlined by the school district / state and report academic data.

Social Emotional Learning

A significant amount of attention has been focused on the link between social and emotional competencies and academic achievement. According to the Collaborative for Academic, Social, and Emotional Learning (CASEL), "socially and emotionally competent students are better able to take advantage of classroom learning opportunities and experiences and facilitate rather than disrupt the learning of their peers" (CASEL, 2008). United Way and agency partners have been working together since 2012 to promote a common method to measure social and emotional competencies amongst children/youth in grades K-8. The rationale is two-fold: 1) we know that social and emotional competencies are predictive of academic and non-academic success in adulthood; and 2) social and emotional competencies are a core part of most of the services in which we invest, and thus a measure that is reasonably within the program's control to improve.

Afterschool / Youth Development

Afterschool is a term used to describe youth development programming that occurs beyond the school day offering a wide range of learning and enrichment activities that promote the physical, emotional, cognitive and social development of children and youth. It encompasses programs that have such focuses as tutoring, recreation, arts, character education, literacy, service-learning, and general enrichment (*National Institute on Out-of-School Time*, www.niost.org).

Required Assessment Tool

Since 2012, United Way has expanded current efforts using the Devereux Student Strengths Assessment (DESSA-mini / DESSA) as a common measure of social emotional competence in children and youth. **Agencies that select the following performance measure will be required to use the DESSA or DESSA-Mini:**

- Children/youth demonstrate social and emotional skills necessary for success

NOTE: This performance measure may only be selected by those providers using the DESSA or the DESSA-mini. It represents a composite of the eight social and emotional scales recognized as predictive of academic achievement. Programs selecting this measure must do so reporting the number of children/youth with a t-score of 41 or higher using the DESSA or DESSA-mini. For more information please see the website, http://www.devereux.org/site/PageServer?pagename=dessa_index or contact United Way.

Afterschool programs with effective data collection methods will be required to select at least one of the following academic measures:

- Children/youth achieve grade promotion
- Children/youth meet IEP goals
- Children read proficiently by third grade
- Youth graduate from high school
- Youth enroll in college/university or post-secondary career training program

Programs selecting this measure **must collect data on children/youth who attend on a regular basis for a minimum of 12 consecutive weeks.**

STRATEGY 7. POST-SECONDARY EDUCATION & TRAINING

United Way is interested in programs with a proven link to increasing on-time high school graduation and the attainment of post-secondary credentials (e.g. Specialized Training Certificate, Associate's Degree or higher). Programs that have demonstrated an ability to improve access to post-secondary education and / or technical or vocational certification are required to select the following one or both performance measures:

- Youth graduate from high school
- Youth enroll in college/university or post-secondary career training program

Funding Requirements

STRATEGY 8. BASIC NEEDS/EMERGENCY ASSISTANCE

Performance Measures

The following performance measures are required for all emergency assistance programs:

- Head of Household served (duplicate & unduplicated)
- Number of specific tangible resources (food, rent/mortgage/utility assistance, other financial assistance, clothing, etc.) as is appropriate for the program

The following performance measures are required for Stabilization programs:

- Households assessed via the Self Sufficiency Matrix
- Households that show improvement on the Self Sufficiency Matrix

Data Management System:

- All funded emergency assistance programs will be required to enter and maintain data on individual clients, activities and outcomes into the VESTA database system

STRATEGY 8. BASIC NEEDS/HOUSING

Performance Measures

The following performance measures are required for all shelter programs:

- Households served (engaged) in calendar year
- Households exiting to positive housing outcomes
- Households increased total income at update or exit (housing)

Data Management System:

- All funded shelter programs will be required to enter and maintain data on individual clients, activities and outcomes into VESTA database unless previous exception given by UW for certain shelter programs

STRATEGY 10. EMPLOYMENT & CAREER PATHWAYS

Performance Measures

The following three performance measures are required for all employment programs:

- Individuals complete job readiness program and learn workplace life skills
- Individuals obtain employment
- Individuals retain employment 12 months after entry into the employment

Data Management System:

- All funded workforce programs will be required to enter and maintain data on workforce activities and outcomes into the United Way Integrated Data System & Warehouse (TRAX)

OPPORTUNITY AGENDA

INTEGRATED PERFORMANCE MEASURES

Programs and providers engaged in ongoing professional development attain or have plans to attain higher quality ratings

Children participating for a minimum of six months demonstrate progress in social and emotional development

Children participating for a minimum of six months demonstrate progress in cognitive and language skills

Children participating for a program year are assessed age-appropriate in social and emotional development or meet IFSP or IEP goals

Children participating for a program year are assessed age-appropriate in cognitive and language skills or meet IFSP or IEP goals

Pregnant women receive adequate prenatal care

Children receive appropriate preventive healthcare

Children/Youth who have experienced abuse and/or trauma respond positively to screening (i.e. clinical or therapeutic counseling, referral for service, etc.)

Parents/caregivers show increase in their understanding to support their children's development

Parents/caregivers show increase in their ability to support their children's development

Children enrolled in quality early learning programs enter kindergarten “ready” as measured by state readiness tool

Number of new quality early childhood slots

Unemployed/Underemployed parents access quality child care

OPPORTUNITY AGENDA

INTEGRATED PERFORMANCE MEASURES

Children/youth participate two or more times a week in structured, supervised activities outside of school hours

Children/youth demonstrate social and emotional skills necessary for success (defined by DESSA)

Children/youth achieve grade promotion

Children read proficiently by third grade

Children/youth meet IEP goals

Youth graduate from high school

Youth enroll in college/university

Youth enroll in post-secondary career training program

Individuals demonstrate improvements in literacy skill levels (reading, writing and speaking the English language, numeracy, problem-solving, English language acquisition, and others)

Individuals earn a secondary school diploma or the High School Equivalency Diploma/GED

Individuals complete postsecondary education or vocational training

Individuals complete certificate/credential in occupational skill/work readiness skill-NCRC or other nationally recognized credential

Head of Household served (duplicate & unduplicated) (emergency assistance & housing assistance)

Number of specific tangible resources (food, rent/mortgage/utility assistance, other financial assistance, clothing, etc.) as is appropriate for the program

Households increased total income at update or exit (housing)

OPPORTUNITY AGENDA

INTEGRATED PERFORMANCE MEASURES

Household income moved above 100% FPL

Household income moved above 200% FPL

Households assessed via the Self Sufficiency Matrix

Households that show improvement on the Self Sufficiency Matrix at exit (or annual assessment)

Households screened for public benefits eligibility (SNAP, Medicaid, CHIP, Medicare, child care benefits)

Households receive stabilization services

Individuals have employment barriers removed/issues resolved (transportation, child care, education, computer proficiency, intimate partner violence)

Individuals complete job readiness program and learn workplace life skills (resume, job search techniques, interviewing skills, time management, problem-solving, work behaviors)

Individuals obtain employment

Individuals obtain employment with benefits

Individuals retain employment 12 months after entry into the employment

Individuals advance in job earnings and/or position

Individuals increase knowledge of financial concepts (budgeting, savings, credit, debt)

Individuals increase income

Individuals increase net worth

Individuals create and maintain a budget (pay bills on time) over time

OPPORTUNITY AGENDA

INTEGRATED PERFORMANCE MEASURES

Individuals open an IDA

Individuals cash out IDA and obtain asset (house, auto, education)

Individuals/families improve credit rating/score

Engaged individuals move from the streets to positive housing options, including emergency shelter

Households exiting to positive housing outcomes

Households remaining in their permanent housing type or exiting to another form of permanent housing (permanent and transitional housing only)

Families/individuals obtain affordable housing (owner/rental)

Individuals engaged with outreach staff to develop plan for housing (homeless outreach)

Individuals improve healthy behaviors

Individuals rate themselves good or excellent health

Individuals reduce risk for abuse, neglect or exploitation

Individuals have a usual and appropriate place to go for healthcare, mental health or dental care

Individuals with increased capacity to manage their chronic condition

Individuals demonstrate new knowledge/skills to overcome identified barriers to recovery

Individuals increase capacity to manage their disability

Individuals increase capacity to live independently

Individuals with moderate to high nutrition risk receive a nutritious meal (1/3 the recommended daily intake), allowing them to remain independent for six months

VI. 2017 Proposal Components & Questions

Priority Populations Proposal Questions

I. Profile

- a. Agency Name
- b. Program Name
- c. Program Description (3-5 sentences used for marketing purposes)
- d. Are you applying as:
 - A single service
 - A wrap-around (multiple services)
 - Collaborative
- e. Is this a Multi-Generation pilot program?
- f. Requested investment amount
- g. Priority population [choose one]
 - Individuals
 - Family-Centered (primarily children under 6)
 - Family-Centered (primarily children 6-24)
 - Family-Centered (all ages under 25)

II. Design

- a. Logic Model Visual (Upload). Note: Programs applying as a wrap-around service can include up to two additional pages to describe the services either visually or narratively.
- b. UWCG strategy area (pick at least one)
- c. List up to six performance measures with 2018 targets that the program will report results for to UWGC.
 - At least one measure must be a UWGC measure
 - Other measures can be UWGC measures or developed by the program
- d. Total number of individuals to be served in 2018
- e. Demographic targets

	% Actual	% Estimated	% Unknown	Total must equal 100%
Age				
Gender				
Race				
Ethnicity				
Financial Status				
Zip Code				
County				
Veteran Status				

- f. Please provide rationale for any percentages within the Demographic Targets that are Estimated or Unknown or any other comments on demographic targets [1,000 characters]

III. Results & Learning

- a. What significant results or accomplishments has the program achieved? [3,000 characters]
- b. Describe a recent program change, why the change was made and what was learned throughout the process. [3,500 characters]

IV. Priority Populations

- a. Provide a clear case for how this program leads to measurable change for people with incomes below 200% FPL. [3,000 characters]
- b. How does this program intentionally reach people with incomes below 200% FPL? [2,000 characters]
- c. How many individuals were served in the last full program year?
- d. What percentage of individuals served had incomes below 200% FPL?
- e. What percentage of individuals served had unknown income?
- f. What percentage of individuals served are members of a family with income below 200% FPL?
- g. Optional: Describe any 2018 plans to improve collection of income data or to increase focus on individuals or families with incomes below 200% FPL. [1,000 characters]

V. Specialized Questions for Collaborative Projects

- a. Names of lead agency & partners
 - b. Describe the role of lead agency [1,000 characters]
 - c. Developmental milestones & critical events [3,000 characters]
 - d. Describe continuous quality improvement plans that will guide the work of the collaborative [2,000 characters]
- + Partnership Agreement & Collaborative Scales (will be required if funded)

VI. Family-Centered Learning

- a. After reviewing the readiness self-assessment, is this program ready to participate in family-centered learning?
- b. After reviewing the requirements, this program is applying to participate in cohort:
 - Develop Family-Centered Practice
 - Improve Family-Centered Practice
 - Strengthen Multi-Generation Partnerships
- c. Explain why you have selected this cohort. [2,000 characters]
- d. Describe one family-centered practice from the readiness assessment that you do well. [1,000 characters]
- e. What do you want to accomplish and learn in four years through family-centered learning? [2,000 characters]

- f. How do you currently involve the communities you serve in designing your services or what are your plans to do so? [1,000 characters]

VII. Multi-Generation Pilot Program

A pilot program is defined as a program that has been operating for less than six months or is ready to begin operations early in 2018. United Way may invest in a few pilot programs that provide services and track outcomes for multiple generations simultaneously. Pilot programs can be single programs, wrap-around services or collaboratives.

Pilot programs should complete all sections of the proposal. Instead of providing past results, the pilot program should specify what is intended to be accomplished by the program in the near term.

In addition, pilot programs are required to provide:

- Upload proposed business plan including long-term goals
- Upload proposed budget, specifying all sources of funds
- Explain why this pilot program is being developed and what steps have been taken so far toward implementation. [3,000 characters]

VIII. Proposal Program Budget

	Income		Expenses
Fundraising		Salaries, Benefits & Taxes	
United Way of Greater Cincinnati		Supplies & Equipment	
Other United Ways		Travel	
Government Fees & Grants		Professional Development	
Memberships & Dues		Assistance to Individuals	
Program Service Fees		Evaluation	
Third-Party Reimbursement (Non-Government)		Indirect Costs	
Miscellaneous Income		Miscellaneous Expenses	
Total		Total	

- Direct Unit Cost:
- Please explain how the Direct Unit Cost was calculated [1,000 characters]
- Optional: Proposal Budget Comments [1,500 characters]

IX. Executive Signature

Strategies Across Incomes Proposal Questions

I. Profile

- a. Agency Name
- b. Program Name
- c. Program Description (3-5 sentences used for marketing purposes)
- d. Are you applying as:
 - A single service
 - A wrap-around (multiple services)
 - Collaborative
- e. Requested investment amount

II. Design

- a. Logic Model Visual (Upload). Note: Programs applying as a wrap-around service can include up to two additional pages to describe the services either visually or narratively.
- b. UWCG strategy area (pick at least one)
- c. List up to six performance measures with 2018 targets that the program will report results for to UWGC.
 - i. At least one measure must be a UWGC measure
 - ii. Other measures can be UWGC measures or developed by the program
- d. Logic Model Narrative [3,500 characters]
 - i. Community Conditions
 - ii. Target population
 - iii. Significant activities
 - iv. Significant partnerships
- e. Total number of individuals to be served in 2018
- f. Demographic targets

	% Actual	% Estimated	% Unknown	Total must equal 100%
Age				
Gender				
Race				
Ethnicity				
Financial Status				
Zip Code				
County				
Veteran Status				

- g. Optional: Comments on demographic targets [1,000 characters]

- h. Please provide rationale for any percentages within the Demographic Targets that are Estimated or Unknown [1,000 characters]

III. Results & Learning

- a. What significant results or accomplishments has the program achieved? [3,000 characters]
- b. Describe a recent program change, why the change was made and what was learned throughout the process. [3,500 characters]

IV. Proposal Program Budget

	Income		Expenses
Fundraising		Salaries, Benefits & Taxes	
United Way of Greater Cincinnati		Supplies & Equipment	
Other United Ways		Travel	
Government Fees & Grants		Professional Development	
Memberships & Dues		Assistance to Individuals	
Program Service Fees		Evaluation	
Third-Party Reimbursement (Non-Government)		Indirect Costs	
Miscellaneous Income		Miscellaneous Expenses	
Total		Total	

- a. Direct Unit Cost:
- b. Please explain how the Direct Unit Cost was calculated [1,000 characters]
- c. Optional: Proposal Budget Comments [1,500 characters]

V. Specialized Questions for Collaborative Projects

- a. Names of lead agency & partners
- b. Describe the role of lead agency [1,000 characters]
- c. Developmental milestones & critical events [3,000 characters]
- d. Describe continuous quality improvement plans that will guide the work of the collaborative [2,000 characters]

+ Partnership Agreement & Collaborative Scales (will be required if funded)

VI. Executive Signature

Glossary of Terms

Activities: What a program does with its inputs – the services (strategies, techniques) provided for participants.

Agency Partner: An organization that has received funding from United Way of Greater Cincinnati in 2017.

Apricot: (Also known as CTK) The United Way Online Reporting system that is used to submit proposals and reports to United Way of Greater Cincinnati. This system is accessed through the link: <https://ctk.apricot.info> and requires a user-name and password. Contact barb.bruser@uwgc.org if you need to set up an account.

Bold Goals for Our Region: 10-year goals that represent the foundation on which we can more readily achieve our vision for everyone to have the opportunity to thrive. We believe there is power in the collective voice and collective will of our community. While the goals may not represent the totality of every organization's mission, collectively they are fundamental to improving lives and creating lasting change. By working together, we believe we will accelerate the achievement of the promise inherent in all of our shared agendas.

Call for Partners: The United Way of Greater Cincinnati investment process developed to create sustained community change by mobilizing partners and resources to address community-level outcomes.

Cohort/Learning Cohort: A group of organizations that learn from each other.

Collaborative: A mutually beneficial and well-defined relationship entered into by two or more organizations to achieve common goals. Collaboration includes a commitment to: mutual relationships and goals; a jointly-developed structure and shared responsibility; mutual authority and accountability for success; and, sharing outcomes, resources and rewards. For a Collaborative Project to be considered for United Way investment, a collaborative must demonstrate shared decision-making, shared resources and shared accountability among participating organizations and groups.

Collaborative Partnership Agreement: Many organizations collaborate with each other, but a smaller number enter into a formal, collaborative relationship to achieve a specific and shared outcome. For a collaborative project to be considered for support by United Way, there must be demonstration of shared decision-making, shared resources, shared accountability, and shared outcomes among participating organizations. The ongoing, collaborative effort is consistently improved based on the progress made toward achieving the stated outcomes, and all participants understand and revise their contributions, roles and responsibilities based on what is learned from data over time. Partners in a collaborative project must have signed partnership agreements that include at least the following:

- Listing of the contact information for the lead agency and each partner
- Clear definition of each collaborative partner's role, outlining the resources each partner is responsible for bringing to the collaborative
- Description of the financial accountability of the lead agency and each partner
- Description of the activities/outcomes that each collaborating partner is responsible for within the collaborative efforts

Continuous Feedback: A control and evaluation system that actively amplifies and empowers constituent feedback such that it elicits a useful response from decision makers and ensures real accountability, especially in power relationships wherein the end user traditionally does not have a voice.

Continuous Improvement: Using evaluation and evaluative thinking to learn in real time and adapt strategies to changing circumstances.

Data Collection Method: The tool or instrument used to measure the performance measure, as well as the method or process used to collect and manage the data.

Equity: Fair and just inclusion where all can participate, prosper and reach their full potential. United Way commits to equity in every aspect of our work. To achieve the Bold Goals, we recognize disparities by race, class, and gender are pronounced and require we intentionally focus resources on vulnerable and traditionally marginalized populations.

Family: United Way has adopted a broad definition of family: “children and the adults in their lives.”

Family-Centered Practice: Coordinated and integrated solutions to help families build on their strengths and overcome complex challenges. Being family-centered begins with valuing family members’ ability to set their own goals and make decisions in their own best interest. Adopting family-centric practice involves multiple overlapping steps: 1) developing the mindset; 2) building capacity; 3) changing practice; 4) strengthening partnerships and integrated services; and 5) changing system-level policies.

FPL (Federal Poverty Level): The Federal Poverty guidelines issued each year by the U.S. Department of Health and Human Services, known as the Federal Poverty Level (FPL). At least 200% FPL is commonly considered the level of income needed for basic self-sufficiency. Chart created by Advocates for Ohio’s Future.

2017 Federal Poverty Guidelines					
Household Size	100%	138%	150%	200%	400%
1	\$12,060	\$16,643	\$18,090	\$24,120	\$48,240
2	\$16,240	\$22,411	\$24,360	\$32,480	\$64,960
3	\$20,420	\$28,180	\$30,630	\$40,840	\$81,680
4	\$24,600	\$33,948	\$36,900	\$49,200	\$98,400
5	\$28,780	\$39,716	\$43,170	\$57,560	\$115,120
6	\$32,960	\$45,485	\$49,440	\$65,920	\$131,840
7	\$37,140	\$51,253	\$55,710	\$74,280	\$148,560
8	\$41,320	\$57,022	\$61,980	\$82,640	\$165,280
*For households with more than 8 persons, add \$4,180 for each additional person					

Human-Centered Design: A design and management framework that develops solutions to problems by involving the human perspective in all steps of the problem-solving process. Human involvement typically takes place in observing the problem within context, brainstorming, conceptualizing, developing, and implementing the solution.

Improvement Science: A methodology for using disciplined inquiry to solve a specific problem of practice.

Inputs: The resources a program uses to support its activities and achieve its outcomes, including staff, volunteers, participants, facilities, supplies, resources, funding, etc.

Key Strategies & Measures: United Way has prioritized key strategies and measures (in bold) that we believe will accelerate progress and represent investment priorities.

Lead Agency (of a Collaborative Project): While a lead agency in a collaborative will serve many roles, for the purposes of United Way, the lead agency is the applicant in the Call for Investment, the fiscal manager of the project and the United Way agency partner.

Learning Agendas: An intentional framework and set of questions that are designed to help an organization test assumptions, shape inquiry about a particular subject, develop or enhance strategy, and build a feasible action plan.

Learning Organization: An organization skilled at creating, acquiring, and transferring knowledge, and at modifying its behavior to reflect new knowledge and insights. The five components are: 1) systematic problem solving; 2) experimentation; 3) learning from experience; 4) learning from others; and 5) transferring knowledge

Learning Network: Learning communities distinguished by four essential characteristics: 1) focused on a well-specified aim; 2) guided by a deep understanding of the problem, the system that produces it and a theory of improvement relevant to it; 3) disciplined by the rigor of improvement science; and 4) coordinated to accelerate the development, testing and refinement of interventions and their effective integration into practice across varied contexts.

Logic Model Visual: A systematic and visual representation of the relationships among the resources an organization has to operate the program, the activities it plans to do and the changes or results it hopes to achieve. The logic model illustrates the program's theory of change or the "if . . . then" statement: if we do this, then this change will happen.

Outcomes: Benefits or changes for individuals or populations during or after participation in program activities reflecting a change in knowledge, attitudes, skills, behavioral changes, or changes in condition or status.

Outputs: Direct products of program activities and usually measured in terms of the volume of work accomplished; e.g., number of classes taught, counseling sessions conducted, etc.

Model for Improvement: The Model for Improvement, developed by Associates in Process Improvement, is a simplistic, yet robust framework for quality improvement used in many sectors including healthcare. The Model for Improvement includes three primary components: 1) *Aim* – What are we trying to accomplish?; 2) *Measure* – How will we know that a change is an improvement?; and 3) *Test or Plan, Do, Study, Act (PDSA)* – What change(s) can we make that will result in improvement?

Multi-Generation Program: Provides intentional services for at least two generations, either within the organization or through seamless partnerships. Outcomes are tracked for the adults, children and family.

New Organization: Any organization that has not received funding from United Way of Greater Cincinnati in 2017.

Partnership Standards & Policies: United Way's expectation that agency partners meet certain standards and adhere to specific policies. Refer to the strategy funding directives and the complete Partnership Standards & Policies are available in the Apricot Call for Partners folder in the My Shared Documents section.

Performance Measures: Specific observable, measurable characteristics or changes that represent achievement of a program outcome. Performance measures are what have been observed, measured, assessed, or monitored in clients or systems to learn if the outcome has been achieved.

Pilot Program: A program that has been operating for less than six months or is ready to begin operations early in 2018.

Place Matters: A citizen-led partnership between local funders and neighborhood nonprofits working collectively for the transformation of communities in greater Cincinnati and northern Kentucky

Program: A set of activities, strategies or services to impact a set of outcomes. This term may incorporate a single program, wrap-around services provided by one organization, or a multi-partner collaborative.

Quality Improvement: Quality improvement can be broadly defined as a formal approach to analysis of performance and systematic efforts to improve it (Department of Community and Family Medicine, Duke University School of Medicine).

Renewal Process: Programs in the Priority Population tracks that are offered an initial two-year investment commitment (2018-2019) will have the opportunity to be considered for a two-year renewal for 2020-2021. A renewal process does not require a full application, but involves a review of progress-to-date and evaluation of United Way investment.

Reapplication Process: Programs in the Strategies Across Income track will have the opportunity to complete an application for United Way investment in 2020-2021.

Reporting Requirements: The information that must be collected for reporting to United Way at both the organization and program level, including financial reports, client demographics, program outcomes, client success stories, and continuous learning and improvement. The reporting requirements are listed in the Partnership Standards & Policies packet available in the Apricot Call for Partners folder in the My Shared Documents section.

Self-Sufficiency: Although there are multiple methods for calculating self-sufficiency, United Way currently uses the 200% Federal Poverty Level as an indicator of ability to meet basic needs. We recognize that this income level is generally not sufficient to save for a crisis or achieve long-term goals.

Target Population: a defined set of people that a deliberate action is intended to benefit. A target population may be defined by relationship to a particular program or service (e.g., clients of community shelters for homeless families), by geographic locations (e.g., residents of Eastside neighborhood), by demographic characteristics (e.g., Hispanic children), by relationship to an issue of concern (e.g., recent immigrants who are unemployed), or in other ways.

TRAX: See entry for “United Way Integrated Data System & Warehouse”

United for Opportunity Agenda 1.0: (Also known as the Opportunity Agenda) represents United Way’s high-level vision for accelerating progress toward the Bold Goals by focusing on people below 200% FPL with an integrated, holistic approach. The Opportunity Agenda outlines the key principles, priority populations and high-level strategies that will drive United Way of Greater Cincinnati’s work. We have labeled this version 1.0 because we know changes will happen over time as we learn with community partners. See Appendix A.

United Way Integrated Data System & Warehouse: (also known as TRAX) United Way of Greater Cincinnati has invested in a new integrated data system that provides case management function (for those who choose to use it) or capability to upload data in a shared warehouse. Use is currently in the pilot stage.

United Way Performance Measures: 61 performance measures that have been selected to reflect progress toward the United Way strategies. Programs are required to select at least one United Way measure that they will report results for over time.

United Way Strategies: Thirteen strategies that represent important education, income and health milestones that evidence suggests are critical for everyone in our region to have the opportunity to thrive. Programs in all investment tracks must demonstrate alignment with one or more of these strategies. United Way has prioritized key strategies (in bold) that we believe will accelerate progress and represent investment priorities.

Wrap-Around Services: A set of activities, strategies or services to impact a set of outcomes provided by one organization that benefits the same population, but might not be defined as a traditional program.

APPENDIX

WHY

United Way fights for the Education, Health, and Financial Stability of **every person** in our community. The Bold Goals represent our collective ambition for everyone to have the **opportunity to thrive**.

Poverty is undermining that opportunity for more than 600,000 people in our region. We believe we must **focus on people below 200% poverty** – nearly 1 in 3 of all people – if we are to make faster and more equitable progress towards the Bold Goals.

We believe **focusing on families with children is the highest priority** for United Way to maximize impact, build on our leadership in workforce and early childhood, and break the cycle of generational poverty.

We aspire to help people move out of poverty by integrating Education, Income, and Health strategies, for the children and families in greatest need, in the communities where they live.

GUIDING PRINCIPLES

EQUITY: We believe equity is the fair and just inclusion where all can participate and thrive. In our work to achieve the Bold Goals, we recognize that disparities by race, class, and gender are the most pronounced and, thus, requires that we intentionally focus resources on those with the greatest need.

SHORT & LONG TERM IMPACT: Our approach focuses on moving parents and caregivers out of poverty in the near term, breaking the generational cycle for children in the long term, and improving communities and systems to prevent poverty in the first place.

CHANGE AT SCALE: We aspire to tackle poverty at the scale in which it exists. This ambition requires that we focus on improving systems and policies that can impact thousands of families, while continuing to support direct services that help families move out of poverty.

INTEGRATED: The current system is far too fragmented. We believe much more coordinated and integrated solutions are needed to help families in poverty overcome complex, inter-related challenges.

LOCALIZED: While poverty exists throughout our region, we believe that solutions must be localized to the specific needs of the diverse communities across our region.

COMMUNITY VOICE: We believe the voice, participation and leadership of those we're seeking to help must be included in the development and implementation of all solutions. We must view families as *producers* of outcomes – not just *recipients* of outcomes.

LEARNING-ORIENTED: We will embrace a more flexible approach that seeks to continuously learn to improve results.

EVIDENCE & INNOVATION: We will sustain and scale programs that work, while also making room for identifying, testing and implementing new innovations.

KEY CHANGES IN
UNITED WAY'S
APPROACH

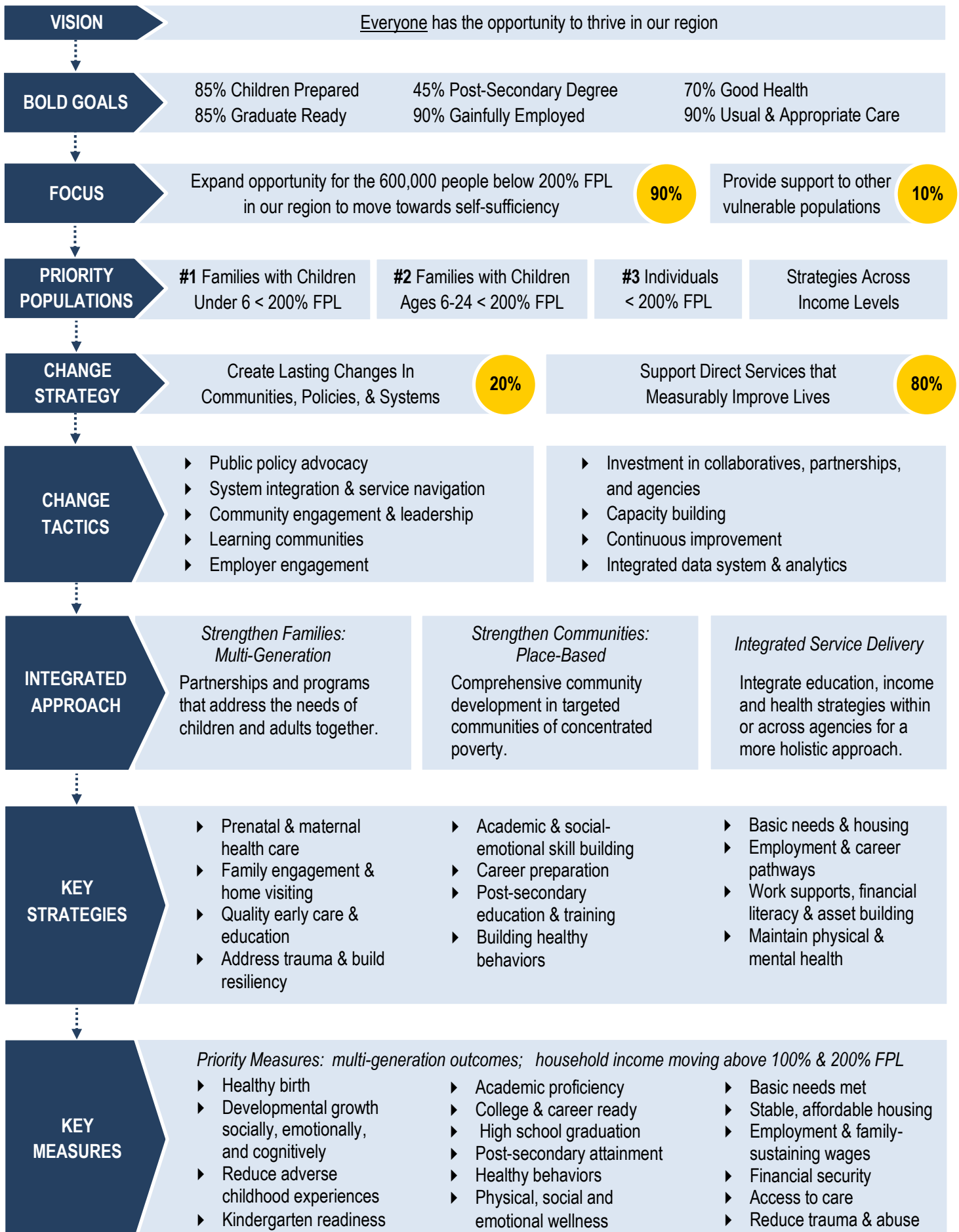
FROM

- ▶ 70% total investment serving people below 200% FPL
- ▶ Multiple target populations
- ▶ Majority focus on individual programs & isolated services
- ▶ Fragmented funding strategies & siloed structure
- ▶ More directive process

TO

- ▶ 90% total investment serving people below 200% FPL
- ▶ Priority focus on families in poverty
- ▶ More focus on collaborative efforts & integrated services
- ▶ Integrated funding strategies & structure
- ▶ More flexible, learning-focused process

UNITED FOR OPPORTUNITY AGENDA 1.0



► Children Have a Strong Start

Children are born healthy and have the social, emotional and developmental supports needed to thrive in the foundational years and arrive ready for school.



► Youth are Prepared for Success

Youth develop the academic, social, and emotional skills necessary for success in college, career, and life.

► Adults & Families Thrive

Our region's residents have the opportunity to reach their full potential and financial self-sufficiency.

▲ A Family-Centered System

Integrated solutions that help families build on their strengths and overcome complex challenges.

➤ Children Have a Strong Start

OPPORTUNITY MEANS:

- Healthy birth
- Developmental growth socially, emotionally, and cognitively
- Reduced adverse childhood experiences
- Kindergarten readiness*

HOW WE EXPAND

OPPORTUNITY:

- Prenatal & maternal health care
- **Family engagement & home visiting**
- **Quality early care & education**
- Address trauma & build resiliency

➤ Adults & Families Thrive

OPPORTUNITY MEANS:

- Basic needs met
- Stable, affordable housing
- Employment* & family-sustaining wages
- Financial security
- Access to care*
- Physical, social and emotional wellness*
- Reduce trauma & abuse

HOW WE EXPAND OPPORTUNITY:

- Basic needs & housing
- **Employment & career pathways**
- Work supports, financial literacy & asset building
- **Maintain physical & mental health**



➤ Youth are Prepared for Success

OPPORTUNITY MEANS:

- Academic proficiency
- College & career ready
- High school graduation*
- Post-secondary attainment*
- Healthy behaviors
- Physical, social and emotional wellness

HOW WE EXPAND

OPPORTUNITY:

- **Academic & social-emotional skill building**
- Career preparation
- **Post-secondary education & training**
- Building healthy behaviors

▲ Building a Family-Centered System

HOW WE CHANGE THE SYSTEM:

- Family Centered Practice
- Place Based Approach
- Equity Focus
- Policy Advocacy
- Building Partnerships
- Encouraging Consumer Voice
- Strategic Learning
- Flexible Funding

** Denotes a 2020 Bold Goal
Bold denotes a key strategy*