This document contains information about United Way of Central New Mexico’s Community Impact Project Multi-Year Grant priorities and application process. For single year grant opportunities spanning education, health, and financial stability & basic needs, see the Community Fund & Affinity Group Annual Grants Applicant Manual. All applications must be completed online. This manual can be used to guide your application process. Contact UWCNM with questions at (505) 245-1736.
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016 UWCNM Grants Overview</td>
<td>3</td>
</tr>
<tr>
<td>New Timeline</td>
<td>4</td>
</tr>
<tr>
<td>UWCNM Community Impact Project Multi-Year Grantmaking</td>
<td>5</td>
</tr>
<tr>
<td>Online Application Username &amp; Password</td>
<td>7</td>
</tr>
<tr>
<td>Eligibility &amp; Required Supporting Documents</td>
<td>8</td>
</tr>
<tr>
<td>Requests for Proposals</td>
<td>10</td>
</tr>
<tr>
<td>Logic Model and Performance Measurement Resources</td>
<td>26</td>
</tr>
<tr>
<td>Application Questions</td>
<td>APPENDIX A, pages 27-31</td>
</tr>
<tr>
<td>Financial Standards Review Criteria</td>
<td>APPENDIX B, pages 32-33</td>
</tr>
<tr>
<td>Scoring Guidelines &amp; Evaluation Criteria</td>
<td>APPENDIX C, pages 34-39</td>
</tr>
<tr>
<td>UWCNM Policies</td>
<td>APPENDIX D, pages 40-41</td>
</tr>
<tr>
<td>Capital Request Guidelines</td>
<td>APPENDIX E, pages 42</td>
</tr>
</tbody>
</table>
2016 UWCNM Grants Overview

United Way of Central New Mexico helps those most vulnerable through grants to qualifying health and human service agencies in Bernalillo, Sandoval, Torrance and Valencia counties. In 2015-16, annual program grants are supporting 103 programs, totaling $3.5 million (requests for 2015-16 funding exceeded $10.5 million).

The UWCNM grant application process is extremely competitive and lengthy. Prior to completing this application, please be certain that the agency/program for which you are applying for funds meets all eligibility criteria. Current or prior funding does not guarantee future funding or the award amount.

This year, in addition to our Community Fund & Affinity Group Annual Program Grants, UWCNM is launching four new multi-year funding opportunities called Community Impact Project Multi-Year Grants* in the following four areas:

- Behavioral Health: Prevention, Early intervention, and Education
- School Attendance (pre-school through 12th grade)
- Summer Learning (pre-school through 12th grade)
- Adult Transitions to College (ages 18 and up)

Annual program grants will no longer be awarded in the above areas.

Agencies may apply for one of each of the following two types of grants if they meet eligibility requirements:

1. Community Fund & Affinity Group Annual Program Grants
   - For single or collaborative applicants
2. Community Impact Project Multi-Year Grants
   - Successful proposals will likely be collaborative projects, though collaboration among multiple agencies is not required

Panels of community volunteers will review proposals, select grantees and determine award amounts.

Please review the scoring guidelines and evaluation forms in each Applicant Manual to understand the criteria used by UWCNM community volunteer allocations panels when scoring proposals and recommending funding.

IMPORTANT: If you are applying as a collaborative with two or more agencies, please contact UWCNM before beginning your application.

*This document contains information about United Way of Central New Mexico’s 2016-17 Community Fund and Affinity Group Annual Program Grant priorities and application process. If you’re interested in applying for multi-year funding, visit www.uwcnm.org to access and print the Community Impact Project Multi-Year Grants Applicant Manual for comprehensive applicant criteria and instructions for that grant opportunity.
New Timeline

Beginning this year, applying for a UWCNM grant is a two-step process.

The first step is submission of Agency and Financial Information. The Agency / Financial sections of the online application will be available **November 3rd through November 20th, 2015, 4:00 PM.**

Upon passing the Financial Review and meeting all eligibility requirements, agencies will be invited to complete their application with the submission of program information. The application will be available **January 5th through February 12th, 2016, 4:00 PM.**

**Applications are due by February 12th, 2016, 4:00 PM.**

**Late applications will NOT be accepted.**

Applicants that submit complete applications by the deadline are invited to present their proposal(s) before a community volunteer allocations panel that will ultimately make funding recommendations. Presentations will occur between **March 28th and April 8th, 2016.** Each agency will be allotted 20 minutes to present and 10 minutes for Q&A. Collaborations will receive additional time.

Agency preliminary award notifications will be sent in **May, 2016**

**First Monthly Grant Installment Paid: July 1, 2016**

All grant recipients will report their mid-year and year-end progress.

**6-Month Report Due: January 15, 2017**

**12-Month Report Due: July 15, 2017**
UWCNM Community Impact Project Multi-Year Grantmaking

This document contains information about United Way of Central New Mexico’s Community Impact Project Multi-Year Grant priorities and application process. For single year grant opportunities spanning education, health, and financial stability & basic needs, see the Community Fund & Affinity Group Annual Grants Applicant Manual.

Community Impact Project Grants Background and Introduction

In alignment with our guiding documents and a call from volunteer leadership, we are further defining priority funding areas to deepen the impact of our grantmaking. In response, we are embarking on a new type of grantmaking that we are hoping will inspire collaborative solutions that work towards systemic change related to some of the most challenging health, education, and financial stability issues in our community. We have defined Community Impact Projects as well-informed, multi-year investments with a discrete issue area focus that have a special emphasis on continuous quality improvement and outcomes measurement.

Behavioral health

Through a methodical scan of the community, we identified behavioral health as a pilot issue for this type of Community Impact Project grantmaking. In alignment with our community driven process, we surveyed both agency partners and behavioral health consumers to understand their perspectives on the most urgent behavioral health needs in central New Mexico, and their suggestions for related UWCNM investments. Next, we brought together a small group of behavioral health subject matter experts that included community partners, and UWCNM volunteers and donors to identify a specific condition to be addressed, giving special consideration to the results of the two surveys. The following request for proposals (RFP) is the result of the recommendations of that group. Noting a gap in attention and funding in the area of behavioral health prevention, early intervention, and education, this RFP is focused on investing in projects that provide those crucial services to children and youth at the ages at which most behavioral health issues begin to manifest.

Education

In the area of education, we have relied on the community driven work of Mission: Graduate to identify education related issues well-suited to Community Impact Project grantmaking. The three education related Community Impact Project RFPs address school attendance, summer learning, and adult transitions to college.

Planning & Support

United Way of Central New Mexico is committed to being a partner in learning and developing this project through a continuous, year-round relationships with CIP grantees that will include any training and support deemed necessary by both the grantee and UWCNM. UWCNM support may also include working with the collaborative participants to create a unique and well-tailored memorandum of
understanding, implementing data privacy measures as needed, finalizing plans for outcomes measurement, and working with all collaborative participants to solidify effective working relationships. Grantees will be asked to report on progress as well as challenges on a regular basis throughout the duration of the grant period.

Built in to these multi-year awards is the opportunity for a planning period during which grantees may finalize plans for project implementation and performance measurement, and seek training crucial to the successful attainment of the project goals. The specifics of the planning period, including length and elements, will agreed upon by UWCNM and the grantee after award notification.

In addition, Community Impact Project Education Grantees will be expected to participate in relevant Mission: Graduate Collaborative Action Network meetings and activities. Other Community Impact Project grantees will be expected to participate in a series of meetings and trainings tailored to each specific project.

**Performance Measurement**

Community Impact Project proposal evaluation will have a strong emphasis on performance measurement. Applicants are required to submit a plan for data collection and analysis, as well as a logic model. The performance measurement portion of the application constitutes 30% of the total possible points. *Please see page 26 for links to related resources.*
Online Application Username and Password

ALL NEW Agencies must email mary.regnier@uwcnm.org:

- Agency Name
- Executive Director, phone number & email address

Mary will then email username, password, and application link (URL) to you.

Currently funded agencies will use their username and password from last year.

**VERY IMPORTANT!!! Before beginning the application, let Mary Regnier know if you are applying:**

- For Community Impact Project Multi-Year Grant funding, Community Fund & Affinity Group Annual Program Grant funding, or BOTH.
- As a single agency; OR with multiple partner agencies as a collaboration.
- AND let Mary know whether the program for which you are applying for funds is a hunger relief or supplemental food assistance program.

We need to talk to you before you begin your application to ensure that you are assigned to the appropriate applications in our online software system.

*Application can be accessed on November 3, 2015 as soon as you receive your username and password.*
Eligibility and Required Supporting Documents
Community Fund & Affinity Group Annual Program Grants are available for agencies that meet the following criteria:

- Certified by the IRS as a 501(c)(3) nonprofit organization
- Be in good standing with the Attorney General’s office and the New Mexico Secretary of State
- Demonstrate financial sustainability through UWCNM financial standards review
- Provide health and human service(s) in one or more of the four central New Mexico counties: Bernalillo, Sandoval, Torrance and Valencia
- Serve the most vulnerable through a program/project that aligns with the UWNCM Community Impact Strategy Maps
- Adhere to UWNM’s social action and non-discrimination policies
- Have a Board of Directors in compliance with agency by-laws

Additionally, applicants must:

- Secure as much financial support as possible from other sources, including fees for service, before seeking UWCNM assistance
- Only apply for support for a program that has a scope of service that aligns with the UWCNM Strategy Maps
- Adhere to UWCNM policy that $ request can be no greater than 50% of agency prior-year revenue (if collaborating, requests should be equal to or less than the sum of all partners’ prior year revenue)
  - Request is preferably less than 100% of program/project budget
- Submit proposal and supporting documents in electronic format through UWCNM-prescribed software by specified deadlines
- Be able to accept electronic ACH deposits if awarded funding

Funding Limitations:

- Fundraising activities are NOT eligible for support through UWCNM grants
- There are strict limits on capital funding (see APPENDIX E)

Required Supporting Documents:
Proposals must be submitted in electronic format through UWCNM-prescribed software. Support documents, which are listed below are required as part of the proposal package and may be submitted electronically or as hard copies:

- Prior year financial statements:
  - Agencies with annual revenues > $500,000; a prior year audit (management letter optional)
  - Agencies with annual revenues < $500,000; internally prepared financial statements (balance sheet, statement of income, and an agency prepared statement of functional expenses) signed by the president or treasurer of the Board signifying the statements are correct
• Prior year 990 income tax return, 990EZ or 990N (e postcard) depending on the IRS requirements (if an audit is completed, 990 should include Schedule D)
• Actual prior year budget, actual current year budget, grant period projected budget (form in online application)
• IRS tax exempt letter for 501(c)(3) nonprofit status
• Current Board of Directors list, including the Chair’s email address

Fiscal Sponsorship
Agencies can apply for only one UWCNM Annual Program Grant each year. However, if an agency is not administering the program, but instead is serving as the “fiscal sponsor” of one or more eligible programs (that do not have their own nonprofit 501(c)3 status), multiple grants can be applied for under a single fiscal sponsor’s information. For example, UNM Foundation may serve as the fiscal sponsor of numerous applicant programs.

Reporting
If awarded funds, you will be asked to complete a 6- and 12- month online report. You will report on progress toward goals stated in your United Way funding award agreement. Compliance with reporting guidelines, as well as the reports themselves, may affect future funding.

Submit electronic 6-month report: January 15th, 2017
Submit electronic year-end report: July 15th, 2017

Reporting
If awarded funds, Community Impact Project Grant recipients will be asked to maintain a year-round relationship with UWCNM. Recipients will work with UWCNM to establish a reporting plan and meeting schedule to discuss progress and challenges. Grantees will be expected to submit two to three electronic reports to UWCNM per year. Education Community Impact Project grantees will be expected to participate in relevant Mission: Graduate Collaborative Action Network meetings and activities. Other Community Impact Project grantees will be expected to participate in a series of meetings and trainings tailored to each specific project. The specifics of this relationship will be solidified in an MOU between the grantee and UWCNM after award notification.
United Way of Central New Mexico
2016-2019 Community Impact Project Grants: Behavioral Health

BACKGROUND AND INTRODUCTION
In response to our guiding documents and a call from volunteer leadership, we are further defining priority funding areas to deepen the impact of our grantmaking. Through this process, we are hoping to inspire collaborative solutions that work towards systemic change related to some of the most challenging health, education, and financial stability issues in our community.

Through a methodical scan of the community, we identified behavioral health as a pilot issue for this type of Community Impact Project grantmaking. In alignment with our community driven process, we surveyed both agency partners and behavioral health consumers to understand their perspectives on the most urgent behavioral health needs in central New Mexico, and their suggestions for related UWCNM investments. Next, we brought together a small group of behavioral health subject matter experts that included community partners, and UWCNM volunteers and donors to identify a specific condition to be addressed, giving special consideration to the results of the two surveys. This request for proposals (RFP) is the result of the recommendations of that group.

Intended Outcome
Improved behavioral health in central New Mexico through the provision of appropriate and effective behavioral health prevention, early intervention, and education to children, youth, and their immediate communities

Prevention and early intervention (EI), combined with education are oft neglected, yet crucial components of a comprehensive behavioral health system of care. This is exacerbated by the lack of traditional health funding sources to fuel prevention, EI, and education need.

While there are community efforts underway to plan for and create a comprehensive behavioral health system in central New Mexico, a continued dearth of prevention, early intervention, and education strategies presents continued challenges. Prevention, EI, and education efforts aimed at improving outcomes for children and youth who are at the age when behavioral health issues begin to manifest are greatly needed. Whereas early treatment and support increases the likelihood of positive outcomes in adult life, a lack of appropriate and timely intervention increases the probability that those children will experience an interruption in education, interaction with the criminal justice system, homelessness, and other negative outcomes in adulthood.

Behavioral Health Community Impact Project Request for Proposals
United Way of Central New Mexico is seeking collaborative proposals from 501(c)(3) organizations serving people within our four-county area (Bernalillo, Sandoval, Valencia, and Torrance Counties) that provide a clear plan for implementing a prevention, early intervention, and education-focused project that seeks to address the unmet behavioral health needs of children and youth. Successful proposals will
demonstrate knowledge of, and a connection to the extensive work in our community being done to create a robust and comprehensive behavioral health system. While the applicant must be a certified 501(c)(3) in good standing, collaborating organizations may include local community centers, health providers, after-school programs, faith-based organizations, school districts, and other relevant entities.

A successful proposal will target either a population of middle and early high school aged children, or alternatively, youth ages 18-24. These target populations have been chosen for this project because these are the ages at which many behavioral health issues begin to manifest, and, as a general rule, there is a gap of several years between when an individual experiences the onset of symptoms and when they receive treatment. Additionally, this is the age at which behaviors begin to have a permanent impact on lifelong outcomes.

The selected project(s) will be considered pilot project(s) to demonstrate the power of strategic partnerships in addressing the behavioral health prevention, education, and early intervention needs of children and youth. As such, Community Impact Project Grants will support projects that are potentially replicable by design, and which promise to serve as excellent case studies for implementation of similar projects in other communities.

At least one proposal will be selected to receive three years of level or increased funding, barring any significant decreases in the UWCNM campaign. Continued funding is contingent upon progress toward agreed upon goals. At the initiation of the grant, UWCNM and the grantee(s) will determine how annual progress will be measured.

**Scope and Approach:**
We are not requiring a particular approach. Instead, we ask that applicants bring creative and innovative strategies that address the intended outcomes.

Successful proposals will seek to accomplish the following:

- Draw upon evidence informed strategies for accomplishing the intended outcomes (*Please see application manual for related resources and information*).
- Given the diversity of current behavioral health work that exists locally, it is paramount that proposals are informed by, and leverage, existing work.
- Proposals must include a demonstrated commitment to work with existing initiatives to address the stated challenges and goals. This includes a purposeful commitment to link with current prevention and data collection efforts.
- Leverage opportunities for inter-organizational collaboration, as appropriate to achieve one’s project objectives.
- There will be a preference for projects with a scope of services beyond what is currently funded by Medicaid.
• Include both the short and long-term outcomes the project seeks to achieve.

Please note that we welcome and encourage applications with a rural component. As such, rural proposals will receive special consideration.

We invite you to consider project designs that include, but are not limited to:

• providing prevention, early intervention, and educational support to both at risk children and their families;
• projects that treat schools as resources and partners;
• preventing escalation, and providing meaningful intervention at the first manifestation of behavioral health issues; and/or
• educating children, youth, their families, and immediate communities about the first signs and symptoms of behavioral health issues, as well as providing appropriate resources and referrals.

Performance Measurement:
Successful proposals will include a realistic plan to assess performance through data collection and analysis. UWCNM requires a plan to measure outputs, the quality of implemented strategies, and to what extent students/families are better off. In addition, all proposals must include a logic model (please see application manual for related resources and information). The measurement portion of the application will be heavily weighted, constituting 30% of the total score.
Planning and Support:

United Way of Central New Mexico is committed to being a partner in learning and developing this project through continuous, year-round relationships with CIP grantees that will include any training and support deemed necessary by both the grantee and UWCNM. UWCNM support may also include working with the collaborative participants to create a unique and well-tailored memorandum of understanding, implementing data privacy measures as needed, finalizing plans for outcomes measurement, and working with all collaborative participants to solidify effective working relationships. Grantees will be asked to report on progress as well as challenges on a regular basis throughout the duration of the grant period.

Built in to these multi-year awards is the opportunity for a planning period during which grantees may finalize plans for project implementation and performance measurement, and seek training crucial to the successful attainment of the project goals. The specifics of the planning period, including length and elements, will be agreed upon by UWCNM and the grantee after award notification.

Prior to funding, selected grantees will work with UWCNM staff to discuss benchmarks, performance measurement, and create a manageable meeting schedule for ongoing learning, assistance, and reporting.

Evaluation Criteria:

A successful proposal will do the following:

- provide a cogent and compelling, evidence informed strategy to address the stated challenge with clear intended outcomes;
- include a logic model that is clearly linked to the goals and intended outcomes proposed;
- describe benchmarks used to assess progress toward intended outcomes;
- provide an effective plan for performance measurement that includes key process measures and outcome indicators, and a clear and detailed method of data collection; and
- score well on all categories within the Evaluation Form (see Scoring Guidelines and Evaluation Form in Applicant Manual)

Please note that the performance measurement portion of the proposal is weighted heavily, constituting 30% of the total score.
BACKGROUND AND INTRODUCTION
In alignment with our guiding documents and a call from volunteer leadership, we are further defining priority funding areas to deepen the impact of our grantmaking. We are embarking on a new type of grantmaking that we are hoping will inspire collaborative solutions that work towards systemic change related to some of the most challenging health, education, and financial stability issues in our community. We have defined Community Impact Projects as well-informed, multi-year investments with a discrete issue area focus that have a special emphasis on continuous quality improvement and outcomes measurement. In the area of education, we have relied on the community driven work of Mission: Graduate to identify education-related issues well-suited to Community Impact Project grantmaking.

EDUCATION COMMUNITY IMPACT PROJECT REQUEST FOR PROPOSALS (RFPs)
Education Community Impact Project grants will align with the work of Mission: Graduate; a cradle-to-career education partnership in central New Mexico with the goal of adding 60,000 new degrees and certificates to central New Mexico by 2020. UWCNM is serving as the “backbone” organization for this work.

Mission: Graduate has convened four Collaborative Action Networks to improve school readiness, increase 3rd grade literacy rates, increase high school graduation rates, increase college certificate/degree attainment, and help graduates find gainful employment in central New Mexico. To do this, Collaborative Action Networks develop and implement “Collaborative Projects.” Information can be found at: http://missiongraduatenm.org/collaborative-projects.

United Way of Central New Mexico is seeking collaborative proposals from 501(c)(3) organizations serving people within our four-county area (Bernalillo, Sandoval, Valencia, and Torrance Counties) that address the following issues:

- School attendance (pre-school through 12th grade)
- Summer learning (pre-school through 12th grade)
- Adult transitions to college (ages 18 and up)
Education RFP #1
School Attendance

Why Attendance Matters
Every day a child spends away from the classroom matters. Research shows that starting in preschool, students who miss just two days of school a month—whether excused or unexcused—are less likely to read proficiently by third grade. By ninth grade, a student's attendance is one of the strongest predictors of whether he or she will graduate from high school. Making sure students show up at school is key to improving their chances at completing high school, going on to college, and securing gainful employment.

Truancy, which accounts only for unexcused absences, causes some to overlook the impact of excused absences. Missing 10 percent or more of the school year (an average of two days a month) – for any reason – is called chronic absence, and puts students at greater risk for falling behind.

Intended Outcome:
A reduction in chronic absence rates within central New Mexico

We are looking for partnerships between one or more community organizations and schools that result in a reduction in chronic absence rates within central New Mexico (Bernalillo, Valencia, Torrance, and Sandoval counties).

Request for Proposals
We are seeking proposals from 501(c)(3) organizations, preferably those that are currently convening or plan to convene as a collaborative, with the goal of improving attendance rates in elementary, middle, and/or high school in central New Mexico; especially in low-income schools with high mobility and high chronic absence rates. While the applicant must be a certified 501(c)(3) organization in good standing, collaborating organizations may include local early childhood centers, health providers, after-school programs, faith-based organizations, school districts, schools, and other relevant entities.

Successful applicants will demonstrate knowledge of, and ability to implement, best and promising practices that are transferable to larger populations.

The selected project(s) will be considered pilot project(s) to demonstrate the power of strategic partnerships in improving attendance and reducing chronic absence rates. As such, Community Impact Project Grants will support projects that are potentially replicable by design, and which promise to serve as excellent case studies for implementation of similar projects in other communities.

UWCNM is not specifying where within central New Mexico, nor to what scale, this project should be implemented.

At least one proposal will be selected to receive three years of level or increased funding, barring any significant decreases in the UWCNM campaign. Continued funding is contingent upon progress toward
agreed upon goals. At the initiation of the grant, UWCNM and the grantee(s) will determine how annual progress will be measured.

Scope and Approach
We are not requiring a particular approach. Instead, we ask that applicants bring creative and innovative strategies that address the intended outcomes.

Proposals should:
• draw upon evidence informed strategies for accomplishing the intended outcomes (Please see application manual for related resources and information);
• be informed by and leverage existing community initiatives;
• include partnerships with relevant area schools in order to facilitate data collection;
• include a demonstrated commitment to work with existing Mission: Graduate initiatives to address the stated challenges and goals (participation in related Mission: Graduate work will be required of awards recipient(s));
• leverage opportunities for inter-organizational collaboration, as appropriate to achieve one’s project objectives; and
• include the short and long-term outcomes the project seeks to achieve.

We invite you to consider project designs that include, but are not limited to:
• Raising awareness and increasing knowledge among target populations about the importance of showing up to school and the consequences of not showing up;
• implementing promising practices in schools and/or out-of-school programs;
• gathering and analyzing actionable data, including chronic absence data disaggregated by race, ethnicity, gender, and other key student characteristics; and
• engaging students, families, schools, and other community partners in developing school-based attendance teams that can develop and implement targeted strategies that address challenges identified by the data; and/or
• developing and implementing youth-led strategies for improving attendance.
Performance Measurement
Successful proposals will include a realistic plan to assess performance through data collection and analysis. UWCNM requires a plan to measure outputs, the quality of implemented strategies, and to what extent students/families are better off. In addition, all proposals must include a logic model (please see application manual for related resources and information). The measurement portion of the application will be heavily weighted, constituting 30% of the total score.

To assess improvement in chronic absence rates, an agreement with the school district(s) and/or early childhood center(s) with which the collaborative is working must be made prior to submission of the proposal and signified through a signed memorandum of understanding (MOU). The agreement should include the provision of baseline data from schools with which the project will operate. Student-level data are preferred but not required. Grade-level data should be collected at a minimum. Surveying families of students may be an appropriate form of measurement as well.

Planning and Support:
United Way of Central New Mexico is committed to being a partner in learning and developing this project through a continuous, year-round relationship with CIP grantees that will include any training and support deemed necessary by both the grantee and UWCNM. UWCNM support may also include working with the collaborative participants to create a unique and well-tailored memorandum of understanding, implementing data privacy measures as needed, finalizing plans for outcomes measurement, and working with all collaborative participants to solidify effective working relationships. Grantees will be asked to report on progress as well as challenges on a regular basis throughout the duration of the grant period.

Built in to these multi-year awards is the opportunity for a planning period during which grantees may finalize plans for project implementation and performance measurement, and seek training crucial to the successful attainment of the project goals. The specifics of the planning period, including length and elements, will agreed upon by UWCNM and the grantee after award notification. Additionally, Mission: Graduate staff will be available to assist in the collection and analysis of chronic absence data from school partners as needed.

Prior to funding, selected grantees will work with UWCNM staff to discuss benchmarks, performance measurement, and create a manageable meeting schedule for ongoing learning, assistance, and reporting.

Evaluation Criteria:
A successful proposal will do the following:
- provide a cogent and compelling, evidence informed strategy to address the stated challenge with clear intended outcomes;
- include a logic model that is clearly linked to the goals and intended outcomes proposed;
• describe benchmarks used to assess progress toward intended outcomes;
• provide an effective plan for performance measurement that includes key process measures and outcome indicators, and a clear and detailed method for data collection; and
• include an agreement with the school district(s) and/or early childhood center(s) with which the collaborative is working that was established prior to submission of the proposal and signified through a signed memorandum of understanding (MOU).

Please note that the performance measurement portion of the proposal constitutes 30% of the overall score.
Education RFP #2
Summer Learning

Why Summer Learning Matters

All young people experience learning loss when they do not engage in educational activities during the summer. Research shows that students typically score lower on standardized tests at the end of summer vacation than they do on the same tests at the beginning of the summer.

Most students lose about two months of grade level equivalency in mathematical computation skills over the summer months. Low-income students, on average, lose more than two months in reading achievement, while their middle-class peers, on average, make slight gains.

More than half of the achievement gap between lower- and higher-income youth can be explained by unequal access to summer learning opportunities. As a result, low-income youth are less likely to graduate from high school or enter college.

Intended Outcome:
A decrease in summer learning loss among children and youth in central New Mexico

We are looking for community partnerships that work to decrease summer learning loss among children and youth in central New Mexico, pre-school through 12th grade.

Request for Proposals
We are seeking proposals from 501(c)(3) organizations, preferably those that are currently convening or plan to convene as a collaborative, with the goal of reducing summer learning loss among children, pre-school through 12th grade. While the applicant must be a certified 501(c)(3) organization in good standing, collaborating organizations may include local early childhood centers, health providers, after-school programs, faith-based organizations, school districts, schools, and other relevant entities.

Successful applicants will demonstrate knowledge of, and ability to implement, best and promising practices that are transferable to larger populations.

The selected proposal(s) will be considered pilot project(s) to demonstrate the power of strategic partnerships in reducing summer learning loss. As such, Community Impact Project Grants will support projects that are potentially replicable by design, and which promise to serve as excellent case studies for implementation of similar projects in other communities.

UWCNM is not specifying where within central New Mexico, nor to what scale, this project should be implemented.

At least one proposal will be selected to receive three years of level or increased funding, barring any significant decreases in the UWCNM campaign. Continued funding is contingent upon progress toward
agreed upon goals. At the initiation of the grant, UWCNM and the grantee(s) will determine how annual progress will be measured.

Scope & Approach
We are not requiring a particular approach. Instead, we ask that applicants bring creative and innovative strategies that address the intended outcomes.

Proposals should:
- draw upon evidence informed strategies for accomplishing the intended outcomes
- be informed by and leverage existing community initiatives;
- include partnerships with relevant area schools, summer learning programs, and/or early childhood centers in order to facilitate data collection;
- include a demonstrated commitment to work with existing Mission: Graduate initiatives to address the stated challenges and goals (participation in related Mission: Graduate work will be required of awards recipient(s);
- leverage opportunities for inter-organizational collaboration, as appropriate to achieve one’s project objectives; and
- include the short and long-term outcomes the project seeks to achieve.

We invite you to consider project designs that include but are not limited to:
- raising awareness and increasing knowledge among target populations about the importance of summer learning activities;
- implementing promising practices in summer schools and/or summer programs;
- engaging students and their families in summer learning activities;
- addressing the summer learning needs of students in preschool through 5th grade, middle school, and/or high school;
- developing innovative technological solutions to help students connect to a variety of different learning opportunities during the summer months; and/or
- increasing opportunities for children and their families to learn together through a “connected learning” approach that engages central New Mexico’s learning ecosystem (e.g., museums, libraries, community centers, etc.).
Performance Measurement
Successful proposals will include a realistic plan to collect and assess performance through data collection and analysis. UWCNM requires a plan to measure outputs, the quality of implemented strategies, and to what extent students/families are better off. In addition, all proposals must include a logic model (please see application manual for related resources and information). The measurement portion of the application will be heavily weighted, constituting 30% of the application score.

To assess reduction in summer learning loss, an agreement with the school district(s), summer learning programs, and/or early childhood center(s) with which the collaborative is working must be made prior to submission of the proposal and signified through a signed memorandum of understanding (MOU). The agreement should include the provision of baseline data from schools, summer learning programs, and/or early childhood centers with which the project will operate. Student-level data are required in order to adequately assess the impact of the summer interventions on each individual program participant. Surveying families of students may be an appropriate form of measurement as well.

Planning and Support:
United Way of Central New Mexico is committed to being a partner in learning and developing this project through a continuous, year-round relationship with CIP grantees that will include any training and support deemed necessary by both the grantee and UWCNM. UWCNM support may also include working with the collaborative participants to create a unique and well-tailored memorandum of understanding, implementing data privacy measures as needed, finalizing plans for outcomes measurement, and working with all collaborative participants to solidify effective working relationships. Grantees will be asked to report on progress as well as challenges on a regular basis throughout the duration of the grant period.

Built in to these multi-year awards is the opportunity for a planning period during which grantees may finalize plans for project implementation and performance measurement, and seek training crucial to the successful attainment of the project goals. The specifics of the planning period, including length and elements, will agreed upon by UWCNM and the grantee after award notification. Additionally, Mission: Graduate staff will be available to assist in the collection and analysis of data as needed.

Prior to funding, selected grantees will work with UWCNM staff to discuss benchmarks, performance measurement, and create a manageable meeting schedule for ongoing learning, assistance, and reporting.

Evaluation Criteria:
A successful proposal will do the following:

- provide a cogent and compelling, evidence informed strategy to address the stated challenge with clear intended outcomes;
- include a logic model that is clearly linked to the intended outcomes proposed (please see application manual for related resources and information);
• describe benchmarks used to assess progress toward intended outcomes;
• provide an effective plan for performance measurement that includes key process measures and outcome indicators, and a clear and detailed method of data collection; and
• include an agreement with the school district(s), summer learning programs, and/or early childhood center(s) with which the collaborative is working that was established prior to submission of the proposal and signified through a signed memorandum of understanding (MOU).

Please note that the performance measurement portion of the proposal constitutes 30% of the overall score.
Education RFP #3
Adult Transitions to College

Why Adult Transitions to College Matter
In 2012, 42% of New Mexico occupations were low-skill jobs and 58% were middle- and high-skill jobs (requiring specialized training, certificate or degree). By 2018, it is projected that only 24% of jobs will be low-skill, and 76% will be middle- and high-skill.

Mission: Graduate surveyed adults who had completed a high-school-equivalency (HSE) exam and found that college is a top priority; yet less than 5% of HSE adult students transition to and complete a college certificate or degree. Currently in central New Mexico, among working age adults, there are 55,598 people with no high school diploma or HSE; there are 114,873 with only a high school diploma or HSE; and there are 120,159 who have taken some college courses but don’t have a degree. Many of these adults will need additional education to thrive in the middle- and high-skill jobs of tomorrow’s economy.

Intended Outcomes
An increase in adult enrollment into post-secondary degree and certificate granting programs in central New Mexico

We are looking for community-level collaborations working to increase enrollment of adults into college degree and certificate programs in central New Mexico (Bernalillo, Valencia, Torrance, and Sandoval counties).

Request for Proposals
We are seeking proposals from 501(c)(3) organizations, preferably those that are currently convening or plan to convene as a collaborative with one or more agencies that connect working-age adults, ages 18 and above, with post-secondary education. Proposals should incorporate plans to (1) assist high school non-graduates to obtain a high-school equivalency and transition to local certificate or degree programs, (2) recruit high school graduates for enrollment in local certificate or degree programs, or (3) re-engage certificate or degree program dropouts or “stopouts” in local certificate or degree programs.

Successful applicants will demonstrate knowledge of, and ability to implement, best and promising practices that are transferable to larger populations.

The selected project(s) will be considered pilot project(s) to demonstrate the power of strategic partnerships in increasing college enrollment among working-age adults. As such, Community Impact Project Grants will support projects that are potentially replicable by design, and which promise to serve as excellent case studies for implementation of similar projects in other communities.

UWCNM is not specifying where within central New Mexico, nor to what scale, this project should be implemented.
At least one proposal will be selected to receive three years of level or increased funding, barring any significant decreases in the UWCNM campaign. Continued funding is contingent upon progress toward agreed upon goals. At the initiation of the grant, UWCNM and the grantee(s) will determine how annual progress will be measured.

**Scope and Approach**
We are not requiring a particular approach. Instead, we ask that applicants bring creative and innovative strategies that address the intended outcomes.

Proposals should:
- draw from evidence informed strategies for accomplishing the intended outcomes (*please see application manual for related resources and information*);
- be informed by and leverage existing community initiatives;
- include partnerships with relevant area institutions of higher education and/or adult education programs in order to facilitate data collection;
- include a demonstrated commitment to work with existing Mission: Graduate initiatives to address the stated challenges and goals (participation in related Mission: Graduate work will be required of awards recipient(s));
- leverage opportunities for inter-organizational collaboration, as appropriate to achieve one’s project objectives; *and*
- include the short and long-term outcomes the project seeks to achieve.

We invite you to consider project designs that include but are not limited to:
- implementing a student support system that addresses the resource and/or advising needs of potential adult college students;
- reducing barriers to enrolling in degree or certificate programs;
- increasing knowledge among target populations of the available resources for and potential benefits of college degree or certificate completion; *and/or*
- implementing peer support groups, mentorships, achievement coaching, and an advising and marketing model that helps individuals enroll in a certificate or degree program or successfully transfer to earn a college credential.

**Performance Measurement**
Successful proposals will include a realistic plan to collect and assess performance through data collection and analysis. UWCNM requires a plan to measure outputs, the quality of implemented strategies, and to what extent students/families are better off. In addition, all proposals must include a logic model (*please see application manual for links to resources*). The measurement portion of the application will be heavily weighted, constituting 30% of the total application points.
To assess certificate and degree program enrollment, an agreement with local institutions of higher education and/or adult education programs with which the collaborative is working must be made prior to submission of the proposal and signified through a signed memorandum of understanding (MOU).

Planning and Support:
United Way of Central New Mexico is committed to being a partner in learning and developing this project through a continuous, year-round relationship with CIP grantees that will include any training and support deemed necessary by both the grantee and UWCNM. UWCNM support may also include working with the collaborative participants to create a unique and well-tailored memorandum of understanding, implementing data privacy measures as needed, finalizing plans for outcomes measurement, and working with all collaborative participants to solidify effective working relationships. Grantees will be asked to report on progress as well as challenges on a regular basis throughout the duration of the grant period.

Built into these multi-year awards is the opportunity for a planning period during which grantees may finalize plans for project implementation and performance measurement, and seek training crucial to the successful attainment of the project goals. The specifics of the planning period, including length and elements, will be agreed upon by UWCNM and the grantee after award notification. Additionally, Mission: Graduate staff will be available to assist in the collection and analysis of data as needed.

Prior to funding, selected grantees will work with UWCNM staff to discuss benchmarks, performance measurement, and create a manageable meeting schedule for ongoing learning, assistance, and reporting.

Evaluation Criteria:
A successful proposal will do the following:

- provide a cogent and compelling, evidence informed strategy to address the stated challenge with clear intended outcomes;
- include a logic model that is clearly linked to the goals and intended outcomes proposed;
- describe benchmarks used to assess progress toward intended outcomes;
- provide an effective plan for performance measurement that includes key process measures and outcome indicators, and a clear and detailed method of data collection; and
- include an agreement with the institutions of higher education and/or adult education programs with which the collaborative is working that was established prior to submission of the proposal and signified through a signed memorandum of understanding (MOU).

Please note that the performance measurement portion of the proposal constitutes 30% of the overall score.
Logic Model and Performance Measurement Resources

Listed below you will find links to resources that may be of help to you as you craft the logic model and performance measure sections of your CIP Grant proposal. **There is no obligation to mimic the precise format(s) presented in these resources. While a clear and effective logic model and performance measurement plan is required of successful applicants, no preference or disadvantage will be incurred as result of using, or abstaining from use of, these particular materials.**

Application Questions

(These questions are provided to help you prepare for and complete the application process. These questions are subject to slight changes prior to opening the online program application in January 2016. However, the following will give you a sense of the required questions/fields. All applications must be submitted online.)

Project Information:
1. Please provide a project description
2. Please describe the target population that will benefit from this specific project.
3. How will this work address the intended outcomes described in the RFP?
4. Please describe how you will provide services related to this project, including the impact this project will have. Remember, proposals should:
   • draw from evidence informed strategies for accomplishing the intended outcomes;
   • be informed by and leverage existing community initiatives;
   • leverage opportunities for inter-organizational collaboration, as appropriate to achieve one’s project objectives; and
   • describe short and long-term outcomes the project will seek to achieve.

5. Please include a logic model that clearly describes how the UWCNM investment will be used to achieve the proposed outcome(s).

6. Please note: Education proposals must include a demonstrated commitment to work with existing Mission: Graduate initiatives to address the stated challenges and goals (participation in related Mission: Graduate work will be required of awards recipient(s)).

Performance and Accountability:
7. Please outline your plan for assessing project performance through data collection and analysis.
   • How will you collect data?
   • What sorts of data will you collect?
   • What key outcome indicators will you use to assess performance?
   • Describe benchmarks you will use to assess progress toward those outcomes.

Budget:
Project Budget:

8. Amount requested from UWCNM: $________
For the following budget section, please report budget information that relates *solely to the project for which you are applying for funding*. Do not report general agency budget information. *Each line item can be further itemized*. Agencies that provide specific, clear, comprehensive budget information will be more competitive in this application process. Please be as precise and detailed as possible.

<table>
<thead>
<tr>
<th>Agency Revenue</th>
<th>Fiscal Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Description</td>
</tr>
<tr>
<td>The agency's total operating budget revenue for the most recently completed fiscal year was:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Program Revenue</th>
<th>Your Actual Prior Fiscal Year</th>
<th>Your Current Fiscal Year Budget</th>
<th>Grant Period (7/1/16 - 6/30/17) Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Your Actual Prior Fiscal Year</td>
<td>Your Current Fiscal Year Budget</td>
<td>Grant Period (7/1/16 - 6/30/17) Budget</td>
</tr>
<tr>
<td>UW Grant Allocation</td>
<td>(grant request)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gov. Funding</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation/Corporate Support, Contributions/Donations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership Dues Received</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investment Income</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>In-Kind Support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Income - (Add label amount)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>
9. Based on your completed project budget, please use the following space to further describe specifically how your agency plans to use United Way funds. (Up to 1,000 characters)
10. Please provide a breakdown of how the UWCNM funds will be used for the specific project (training, mileage, new employees, equipment for the specific service, etc.) (Total should add up to the total request for UWCNM funds for 2016-17). (Up to 1,000 characters)

**Supplemental Community Impact Project Collaborative Proposal Information 2016-19**

*Each Lead Agency is asked to submit this Supplemental Collaborative Proposal Information form. The responses on this form submitted by the Lead Agency should be agreed upon by all participating agencies.*

**For Existing or Returning Collaborations:**

1. Complete the following two fields if you are currently receiving UWCNM grant support for this collaborative program.
   - Is the program more impactful as a collaborative than multiple programs would be if each operate independently? (Up to 4000 characters)
   - Describe the impact your collaborative has had. (Up to 4000 characters)

2. How are you reducing or eliminating duplicate services? (Up to 4000 characters)

3. How have you been able to increase awareness and/or outreach in the community? (Up to 4000 characters)

4. How has sharing best practices impacted your ability to serve your clients? (Up to 4000 characters)

5. Among participating agencies, are there redundant administrative costs? Have duplicate costs been reduced during this funding cycle? (Up to 4000 characters)

6. What qualitative changes in agency operations have occurred as a result of the collaborative? (Up to 4000 characters)

7. Describe a few challenges the collaborative has encountered. What has the collaborative done to address these challenges? (Up to 4000 characters)

8. Optional: Use the following space to develop a “collaborative goal” that may be qualitative OR quantitative that you hope to achieve through continued collaboration. A “collaborative goal” need not be client driven, based on a percentage, nor be required to use numbers for measurement. This is considered separate and in addition to the Performance Measurements and Targets you have identified in the general application. (Up to 4000 characters)

**For New Collaborations:**

1. Complete the following two fields if you are applying for Community Fund support for the first time as a collaborative.
   - Explain why you are choosing to apply for program support as a collaborative. Do you plan to mitigate duplication of services? Will you reduce costs? Will you
increase awareness or outreach? Will you combine best practices? Be specific. (Up to 4000 characters)

- What, if any, additional costs associated with creating the collaboration do you anticipate? What challenges do you anticipate? (Up to 4000 characters)

For All Collaborations:

1. Tell your compelling reason/story as to how collaboration increases impact on client and community wellbeing. (Up to 4000 characters)
2. What does each agency bring to the collaboration (staff, infrastructure, experience, etc.)? (Up to 4000 characters)
3. How will you minimize the risk for:
   - Increased overhead (administrative in particular)
   - Lack of interagency communication that may lead to failure to achieve intended outcomes
   - Unforeseen issues with member agencies

(Up to 4000 characters)

4. If this grant is funded, how will this group of agencies continue to maintain a common agenda, culture and vision? What will be the means and frequency of interagency dialogue and how will that dialogue support the common goals that address a need in the community? (Up to 4000 characters)
5. If awarded funds, how will dollars be distributed among agencies and why? (Up to 4000 characters)

Collaboration Agency Role Program Budget 2016-19

1. UWCNM requires a role budget for each member of the collaborative.

2. The sum of all Agency Role Program Expenses must equal the expense of the entire collaborative program.
APPENDIX B

Financial Standards Review

United Way of Central New Mexico

Financial Requirements for Agencies Requesting Funding

Agency Name: ________________________________________________________________

CPA: _______________________________________________________________________

Agencies are required to submit the following financial information:

<table>
<thead>
<tr>
<th>Compliance</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Prior year financial statements:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Agencies with annual revenues&gt;$500,000; a prior year audit.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Agencies with annual revenues&lt;$500,000; internally prepared financial statements (balance sheet, statement of income and an agency prepared statement of functional expenses) signed by the president or treasurer of the Board signifying the statements are correct.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Prior year 990 income tax return, 990EZ or 990N (e postcard) depending on the IRS requirements. If an audit is completed, 990 should include Schedule D.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Audit management letter (optional) or Agencies with &lt;$500,000 Internal Controls document.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. IRS tax exempt letter for 501(c)3 nonprofit status.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The CPA Review Subcommittee will interpret financial information and make a determination as to compliance. All agencies reviewed by the CPA Review Subcommittee will use the same criteria used for larger agencies and rank financial compliance as (a) Pass (b) Pass with funding contingency or (c) Fail. The subcommittee will notify the panel of its decision.

Using this information, perform the following:

<table>
<thead>
<tr>
<th>Compliance</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. The financial statements and tax return should be consistent. Significant variances should be investigated.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. The financial statements should be reviewed for financial health issues that could affect the agency’s ability to operate and execute the program funded</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Factors to consider are liquidity, profitability, cash flow and capitalization of assets (relations of debt to equity.)

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
</table>

3. The audit management letter, if applicable, or the internal control checklist completed by the agency should be reviewed for issues that could affect the agency’s accountability for United Way Funding.

4. If program expenses total less than 75% of total agency expenses, an acceptable explanation should be included. For agencies with no audit, an agency prepared statement of functional expenses should be reviewed.

5. The budget submitted with the grant application should be reasonable compared to prior year actual performance. Prior year actual program data should be compared to the financial statements for reasonableness. Significant variances should be investigated.

6. The United Way Issue Area Grants are for programs, not general agency support; therefore, this grant request cannot exceed 50% of the agency’s prior year total revenue.

7. United Way does not fund capital expenditures unless they cost less than $4,000 per item and have a depreciable life of less than 5 years (using IRS depreciable guidelines.)

8. Attach a list of incomplete items requiring agency action. All incomplete items should be resolved.

**Conclusion:**

- **PASS**
- **FAIL**

**Recommended Contingencies:**

**Follow-Up Items for Panel:**
APPENDIX C

Review Panelist Scoring Guidelines and Evaluation Criteria

2016 COMMUNITY IMPACT PROJECT GRANT FUNDING CYCLE SCORING GUIDELINES

Read before completing Grant Application & Project Presentation Evaluation Form

The Community Impact Project Grant Application & Presentation Evaluation Form is a critical component of the overall process for effectively evaluating Community Impact Project Grant requests to UWCNM. Panel reviews of the applications are designed to identify a project that has the potential to create the deepest impact in addressing the stated goals of the project. It is important that these forms are completed in a thoughtful and consistent manner. The Evaluation Form is designed to capture in one document both the panel member’s overall impression of the application itself, as well as the agency presentation. Questions on the Evaluation Form should be answered as accurately as possible, given the information provided by the applicant. Although the document is straightforward to use, the following instructions will help in assuring a consistent and objective approach to evaluating applications.

The document is divided into four sections, as follows:

- Section 1: Panel Information
- Section 2: Minimum Funding Criteria
- Section 3: Project Evaluation Criteria
- Section 4: Final Project Evaluation Score

Section 1: Panel Information
Simply document the four items requested (Date, Panel Number, Panel Member Name, and Agency/Project Evaluated).

Section 2: Minimum Funding Criteria
The UWCNM grant applicant must meet certain criteria to be considered for a grant award. These criteria are itemized in this section. If, in the panel’s opinion, the agency applying for a Community Impact Project Grant does NOT meet one or more of these criteria, there is no need to score the grant request- it is eliminated from consideration for an award based on NOT meeting the minimum evaluation criteria. If, in the panel’s opinion, the agency DOES meet all five of these criteria, the panel can move forward with completing and scoring the request.
Section 3: Project Evaluation Criteria
There are four general areas being evaluated, as follows:

- Project Design
- Performance Measurement
- Project Sustainability
- Project Budget

Within each of these general areas, there are questions to be scored. The scoring is set up on a ‘confidence scale,’ with “0” being the low score and “10” being the high score. Based on the grant application and the agency presentation, panel members score each question. The score should be a measure of how ‘confident’ the panel member is in the applicant’s response. The rubric for scoring questions is as follows:

<table>
<thead>
<tr>
<th>Score</th>
<th>Confidence Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9-10</td>
<td>Extremely Confident</td>
<td>The applicant’s project is a ‘model’ or ‘best practice’ in addressing the relevant aspects of this criterion.</td>
</tr>
<tr>
<td>7-8</td>
<td>Highly Confident</td>
<td>The applicant’s project addresses this criterion. The panel member is confident that the agency’s project meets all relevant requirements of the criterion. There is evidence that the agency’s project, while perhaps not a ‘best practice’ in this area, is efficiently and comprehensively responding to the significant components of this criterion.</td>
</tr>
<tr>
<td>5-6</td>
<td>Confident (default response)</td>
<td>This is where the panel member should ‘start’ in their evaluation.</td>
</tr>
<tr>
<td>3-4</td>
<td>Less Confident</td>
<td>Although there may be some evidence that the applicant’s project addresses this criterion, it is inconsistent or unclear. The panel member is uncertain that the application has fully addressed the relevant aspects of this criterion.</td>
</tr>
<tr>
<td>1-2</td>
<td>Little Confidence</td>
<td>Panel member believes it is unlikely that the applicant’s project addresses this criterion. There is little evidence in the grant application and/or in the agency presentation that would allow the panel member to be confident in the agency’s ability to meet this element of the criteria.</td>
</tr>
<tr>
<td>0</td>
<td>No Confidence</td>
<td>Panel member does not believe the applicant meets this criterion.</td>
</tr>
</tbody>
</table>

The panel member should always begin his/her evaluation by scoring the item as “Confident (default response)” (5-6). The panelist should then increase or decrease the score, based on the actual evidence and/or the panel member’s impression of the project. The goal is to be as consistent as possible in answering the questions, in a way that provides an objective evaluation of the grant request. Once each question has been scored, the final evaluation score will be weighted as follows:
- Project Design (40%)
- Performance Measurement (30%)
- Project Sustainability (15%)
- Project Budget (15%)

Section 4: Final Project Evaluation Score

Simply sum the scores for each of the four areas evaluated. Add comments as appropriate. Your Panel Chair Person will apply the weighted formula above to each panel member’s scores.
# 2016 Grant Application and Project Presentation Evaluation Form

Date: 

Panel: 

Panel Member: 

Agency(ies)/Project: 

---

Please read “Scoring Guidelines: UWCNM Grant Application & Project Presentation Evaluation Form” before completing this evaluation form.

**Reminder** - Agencies must meet all of the following funding criteria to be considered:

- Agency provides health and human services in Bernalillo, Sandoval, Torrance and/or Valencia counties
- Project helps vulnerable populations (including underserved, disadvantaged, marginalized, or at risk populations)
- Agency/project complies with UWCNM’s Social Action and Non-Discrimination Policies
- If proposal includes a capital request for equipment such as kitchen, exercise, recreational or primary needs equipment, it meets the criteria for a capital request
- Agency is NOT applying for funds to support fundraising activities

## PROJECT DESIGN  
(Worth 40% of in final evaluation)

<table>
<thead>
<tr>
<th>0 = “No confidence”</th>
<th>1 = “Low”</th>
<th>10 = “High”</th>
</tr>
</thead>
<tbody>
<tr>
<td>How confident are you that the proposal provides an effective strategy for addressing the goals and intended outcomes of the Community Impact Project RFP?</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
</tr>
<tr>
<td><strong>Consider:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Has the agency or collaboration secured all third-party relationships necessary to successfully implement the proposed project?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How confident are you that the stated project goals are specific and attainable?</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
</tr>
<tr>
<td>How confident are you that the project proposed is informed by existing work and collaborates with, partners, or leverages related</td>
<td>0 1 2 3 4 5 6 7 8 9 10</td>
<td></td>
</tr>
</tbody>
</table>
work to the extent necessary to achieve project objectives and/or increase impact? 

| How confident are you that the proposed strategy(ies) are informed by evidence? | 0 1 2 3 4 5 6 7 8 9 10 |
| How confident are you that the project does not provide unnecessarily duplicative services in its outreach area? | 0 1 2 3 4 5 6 7 8 9 10 |

_____ Points Earned for Project Design (50 points maximum)

Notes:

**PERFORMANCE MEASUREMENT (Worth 30% in final evaluation)**

0 = “No confidence” 1 = “Low” 10 = “High”

| How confident are you that the logic model presented contains strategies with clear linkages to both the short-term benchmarks and long-term goals and intended outcomes proposed in the application? | 0 1 2 3 4 5 6 7 8 9 10 |
| How confident are you that the plan for performance measurement will result in an effective assessment of the project, and provide a method for continuous improvement? | 0 1 2 3 4 5 6 7 8 9 10 |

**Consider:**
- Does the plan include reasonable and relevant benchmarks and outcome indicators, are they clearly aligned to project goals? Does the plan include a detailed method of data collection?
- Does the application address how the collaboration will gain access to the data it needs?
  - Are the appropriate and necessary partnerships in place for data sharing and collection?
  - Have MOUs been created to ensure access to data critical to performance measurement?
Points Earned for Community Need & Impact (20 points maximum)

Notes:

PROJECT SUSTAINABILITY (Worth 15% in final evaluation)

0 = “No confidence”  1 = “Low”  10 = “High”

| How confident are you that the agency applying for the Community Impact Project Grant, as well as all members of the collaboration, have good track records and will be able to implement and sustain the project outlined in the application? | 0 1 2 3 4 5 6 7 8 9 10 |

Points Earned for Project Sustainability (10 points maximum)

Notes:

PROJECT BUDGET (Worth 15% in final evaluation)

| How confident are you that the project budget is clear, justified, efficient and reasonable? | 0 1 2 3 4 5 6 7 8 9 10 |

Points Earned for Project Budget (10 points maximum)

Notes:
UWCNM Policies

UWCNM Social Action Policy

Our purpose as an organization is: "To make it easier for neighbors to give, in order to help those most vulnerable." To fulfill that purpose, United Way of Central New Mexico:

♦ Helps people by meeting needs
♦ Responds to social needs, but does not advocate social change
♦ Brings people together to address needs and issues that are supported by the majority of the community

At UWCNM, we are in the passion building business. We believe that people should be able to direct their donations to those issues and organizations which matter most to them. Yet, within our community and throughout the country there are, and will continue to be, social change issues about which people have a serious division of opinions. To address this dilemma, UWCNM has developed this Social Action Policy. Donors may individually designate their gifts to any nonprofit organization, anywhere in the world. This enables donors to fund their passions, whatever those passions may be. However, within the Community Fund, where donations are a mix of funds from multiple donors, United Way cannot and should not fund programs which side with one set of donors over another.

United Way of Central New Mexico, through its Community Fund, is in the role of meeting existing/emerging needs, not in advocating for or aligning with social change issues. Because some issues are divisive, when agencies/groups in our community deal with emotional social change issues and vie for the public’s interest to win support for their views, United Way has a responsibility to clearly step away from that arena. There is a distinct difference between advocating a social change philosophy and evaluating and funding needed critical services. One concerns itself with a judgment as to moral right and wrong, while the other concerns itself only with helping people. United Way's only purpose is to help people.

United Way performs its role by enlisting community support, raising needed funds and then distributing those funds through a local citizen review process to participating charities. For United Way to enter such arenas of controversy would not do justice to United Way's multiple participating charities that depend on United Way to raise funds to support critical services for people in need. Our role is to bring people together to improve our community. To invite controversy into the Community Fund is to risk the very existence of this important fund. Since donors can direct their donations to any nonprofit in the world, it is better to leave the Community Fund to do the work of helping the most vulnerable people in central New Mexico.
The Community Fund is the only service at United Way that is affected by the Social Action Policy. All other services [agency designations, 2-1-1/ Information & Referral, Gifts in Kind, services offered by The Center for Nonprofit Excellence, etc.] are available to all central New Mexico nonprofit organizations.

It is United Way's intent to continue to take an aggressive and active leadership role in solving our community's most pressing social service problems. That role is one of facilitator, mediator, fund provider, and initiator of new services and solutions. Regardless of individual positions on social change issues which will always be present, United Way invites all to join together in a cooperative effort "To Help Our Community Help Itself" and never allow this United Way to be pulled into any social change controversy that should and must be resolved elsewhere.

**UWCNM Non-Discrimination Policy**

United Way of Central New Mexico and agencies receiving UWCNM Community Fund dollars must adhere to laws which provide equal opportunities to all persons regardless of race, color, creed, religion, national origin, gender, age, disability, veteran status, citizenship status or any other protected classification. These laws require equal treatment of employees in recruiting, hiring, training, advancement, compensation, benefits or any other conditions of employment. In addition, the spirit of these laws extend to program services funded by United Way of Central New Mexico’s Community Fund.
Capital Request Guidelines

The following are guidelines for agencies applying for capital expenses through UWCNM Community Fund or Affinity Group grants. Review panelists will use these guidelines in assessing agencies’ proposals. All questions related to these guidelines should be directed to UWCNM staff and may require Community Impact Council review.

1. UWCNM grants CANNOT be used for:
   a) Buildings
   b) Architectural plans
   c) Construction
   d) Renovation with a useful life (not depreciable life) of more than three years

2. Additionally, UWCNM grants CANNOT be used for:
   a) Capital equipment, in part or completely, with a useful life (not depreciable life) of more than three years
   b) Any single item worth more than $4,000

UWCNM requires a straight-line depreciation based on the industry standard for the item.

Any funds granted through a UWCNM grant process must be expended within the fiscal grant year.