



**United Way of the
Greater Dayton Area**

**2012-2014
REQUEST FOR PROPOSAL
Online Application Manual**

**Issued by
The Montgomery County Board of County Commissioners
on behalf of:**

**The Human Services Levy Council,
The Family and Children First Council,
Frail Elderly Services Advisory Committee,**

**and
United Way of the Greater Dayton Area**

**From:
Human Services Levy General Supported Services Funds
Human Services Levy Frail Elderly Supported Services Funds
United Way Live United Funds**

**Submission of Proposal Questions will be accepted from February 8 – 24, 2012
by emailing: jointrfpinfo@dayton-unitedway.org**

**Technical Support Requests for Online Application:
Melonya Cook at (937) 225-3058 / melonyac@dayton-unitedway.org, or
Melissa Bruck at (937) 225-3020 / melissab@dayton-unitedway.org**

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I. REQUEST FOR PROPOSAL

A. PURPOSE

The Montgomery County Board of County Commissioners (MCBCC) and the United Way of the Greater Dayton Area (UWGDA) are requesting proposals for funding for the delivery of any or all health and human services or social services for the residents of Montgomery County. This Request for Proposals (RFP) is on behalf of the joint approvals of the Montgomery County Family and Children First Council (FCFC), the Montgomery County Human Services Levy Council (HSLC), the Montgomery County Frail Elderly Advisory Committee (MCFESAC), and the United Way of the Greater Dayton Area (UWGDA).

The funding for this joint application will include HSLC’s General Supported Services Fund administered by the FCFC, HSLC’s Frail Elderly Supported Services Fund administered by MCFESAC and UWGDA’s Live United Fund. FCFC, MCFESAC and UWGDA will maintain their independent decision-making through the RFP selection process, and will work collaboratively through shared staff, information and joint meetings to be sure that the decision-making process is completely informed.

To aid this process, an assessment of common programming areas has been completed to identify the relationships between the FCFC’s Outcome Teams, the MCFESAC and the UWGDA’s Impact Teams. This will aid the communication process between FCFC, MCFESAC and UWGDA in sharing information and reporting results to all stakeholders.

<u>UWGDA Impact Teams</u>	<u>FCFC Outcome Teams</u>	<u>MCFESAC</u>
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Education -----	Young People Succeeding
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Income -----	Economic Self-Sufficiency Sup. and Engaged Neighborhoods
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Health -----	Healthy People Stable Families Positive Living for Spec. Populations Safe Neighborhoods
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(Incl. Seniors) -----	Frail Elderly Services
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Specific information on the FCFC’s Community Outcomes, Targeted Indicators, and/or current Outcome Team Focus Areas and Initiatives may be obtained by reviewing the FCFC’s website at www.montgomerycountyindicators.org

Specific information on the MCFESAC may be obtained by reviewing their information hosted through Montgomery County’s website at www.mcohio.org (select Departments tab, Family and Children First tab, Frail Elderly tab).

Specific information on the UWGDA’s Community Impact Agenda may be obtained by reviewing the UWGDA’s website at www.LiveUnitedDayton.org

The FCFC Outcome Teams and UWGDA Impact Area Teams will review and establish ranked priorities for all proposals received. This process ensures that community needs are addressed and that the focus areas, priorities and initiatives of the FCFC, MCFESAC, HSLC and the UWGDA have been considered. Available resources are likewise considered and determined through the award recommendation process.

Selected proposals may be awarded a two (2) year agreement beginning as early as July 1, 2012 and ending no later than June 30, 2014.

B. TIMELINE

The following timetable shall apply to this RFP:

RFP Public Notice Release Date	January 31, 2012
Outcome Measurement Training	Part 1: February 7, 2012 8:30 – 11:30 a.m. Part 2: February 7, 2012 12:30 – 4:30 p.m. Location – Madison Lakes Learning and Conference Center
Mandatory Bidders’ Conferences	1: February 8, 2012 from 9:00 a.m. – 12:00 noon 2: February 10, 2012 1:00 p.m. – 4:00 p.m. Location – Montgomery County Job Center
Online Log-In Forms Due	February 14, 2012
Final Q&A due from responders	February 24, 2012 by 5:00 p.m.
Final Posting of Q&A	March 5, 2012 by 5:00 p.m. At www.LiveUnitedDayton.org and www.montgomerycountyindicators.org
Deadline for Submitting Proposals	March 21, 2012

C. LENGTH OF FUNDING

All agreements resulting from this Request for Proposals (RFP) will be subject to certain timing guidelines.

1. Selected proposals may be funded for up to two (2) years. Agreements may begin as early as July 1, 2012.
2. Agreements from selected proposals may terminate as late as June 30, 2014.
3. Selected agreements will be negotiated and executed collaboratively, but independently for the use of Human Services Levy funds by Montgomery County staff, and United Way of Greater Dayton funds through United Way of Greater Dayton Area staff.

D. MANDATORY BIDDERS CONFERENCE

Two **MANDATORY Bidders Conferences** will be held on Wednesday, February 8, 2012 from 9:00 a.m. to 12:00 noon and Friday, February 10, 2012 from 1:00 p.m. to 4 p.m. Both will be held at The Job Center Conference Room C2/C3 located at 1111 S. Edwin C. Moses Blvd. Parking is available adjacent to this building. The Request for Proposals (RFP) will be reviewed and

discussed. Questions will be answered and educational information regarding the RFP will be provided at this time.

Attendance is required for at least one of these two Mandatory Bidders Conferences by any/all agencies that will apply for funding through this RFP. No agency that is not represented in attendance in at least one of these two Mandatory Bidders Conferences will receive password-protected access to the on-line RFP application process.

Proposers will receive pertinent information regarding application completion, submission and deadlines, not attending this session will serve as a basis for failure to meet proposal requirements.

E. SUBMISSION REQUIREMENTS

All proposals must be submitted using the following guidelines:

1. **Proposal applications must be completed and submitted electronically through UWGDA's ANDAR system.** All required sections of the application and any required documents or attachments must be included in the electronic submission. The electronic submission will be considered the submission of the organization.
2. All necessary application forms are accessible in the UWGDA ANDAR system. Background information, identification of FCFC, MCFESAC and UWGDA priorities, focus areas, initiatives and other documentation have been made available at the following websites:

www.montgomerycountyindicators.org

www.mcoho.org

www.LiveUnitedDayton.org
3. Log-in information to submit proposals electronically must be submitted to UWDGA by **Tuesday, February 14, 2012**
4. Questions concerning this RFP and the proposal application may be submitted to the staff of the Montgomery County Office of Family and Children First and United Way of the Greater Dayton Area from February 8, 2012 through February 24, 2012. Answers to questions received by the staff of the Montgomery County Office of Family and Children First and United Way of the Greater Dayton Area will be posted to both of their websites. The deadline to submit questions is February 24, 2012. The final posting of answers will occur by, or on March 5, 2012.

Questions may be emailed to: jointrfpinfo@dayton-unitedway.org

5. All application information must be submitted in the format provided by the UWGDA, FCFC, MCFESAC, HSLC and MCBCC.
6. **Completed proposal applications must be posted electronically by Wednesday, March 21, 2012 at 5:00 p.m. This process includes printing and emailing a pdf of the signed Agency Information and Documentation Form to jointrfpinfo@dayton-unitedway.org by Wednesday, March 21, 2012 at 5:00 p.m. This signed form may also be faxed to 937-**

**225-3074 or delivered to the UWGDA Office at 33 West First Street, Suite 500,
Dayton, Ohio 45402**

7. Late proposals **will not** be accepted or considered.
8. Faxed or hand delivered proposals **will not** be accepted.
9. **The Reviewers, the Human Services Levy Council, the Family and Children First Council, the Frail Elderly Services Advisory Committee, Montgomery County, and the United Way of the Greater Dayton Area reserve the right to reject any proposal that does not follow one or more of the Submission Requirements or guidelines expressed within this RFP.**

F. PROPOSAL REVIEW PROCESS

1. Upon submission each proposal will be reviewed for completeness and accuracy by staff of Montgomery County and the United Way of the Greater Dayton Area.
2. Each proposal will be distributed and reviewed by the appropriate Volunteer Team per the FCFC Outcome or United Way Impact Council. Technical assistance will be provided by staff of Montgomery County and the United Way of the Greater Dayton Area.
3. All proposals will be assessed by the FCFC, MCFESAC and UWGDA reviewers and given a priority ranking which will determine the order of funding award recommendations.

The criteria by which the proposal applications will be reviewed and assessed include:

- I.** Demonstrated relationship to FCFC, MCFESAC or UWGDA priorities
 - II.** Evidence of need for service in the community
 - III.** Agency / Program capacity and ability to provide proposed service (financially and programmatically)
 - IV.** Appropriate Outcome Evaluation measurements and techniques
 - V.** Any others as determined appropriate by the reviewers
4. Montgomery County and the United Way of the Greater Dayton Area staff will work collaboratively with the Volunteer Teams to be sure that the decision-making process is completely supported and informed.
 5. The FCFC, MCFESAC and UWGDA reserve the right to contact a proposer for clarification of the application proposal submitted.
 6. Final awards and agreements are subject to the sole respective discretion of the Montgomery County Board of County Commissioners and United Way of the Greater Dayton Area.

G. RESULTS OF THE PROPOSAL REVIEW

The resulting decisions of the review process will be provided as timely as possible to each organization that submits a proposal. Each organization will receive written notice indicating the reviewers' final decisions.

H. LIMITATIONS OF RFP FUNDING

All proposal applications submitted are subject to the following limitations:

1. This RFP does not commit Montgomery County, the Human Services Levy Council, the Frail Elderly Services Advisory Committee, the Family and Children First Council or the United Way of the Greater Dayton Area to award an agreement or pay **any** costs incurred in the preparation of a proposal application.
2. Montgomery County, the Human Services Levy Council, the Frail Elderly Services Advisory Committee, the Family and Children First Council or the United Way of the Greater Dayton Area reserve the right to accept or reject any and all proposal applications received.
3. Montgomery County, the Human Services Levy Council, the Frail Elderly Services Advisory Committee, the Family and Children First Council or the United Way of the Greater Dayton Area reserve the right to negotiate any and all services, unit costs, activities, evaluation details, any other details, and final award amounts with any and all proposers who have submitted a proposal application.
4. All proposal applications are subject to open public records laws.

All Proposal applications submitted seeking **Montgomery County General Supported Services and Frail Elderly Supported Services** funding are subject to the following additional specific limitations:

1. Funds may be expended only for the direct delivery of services to Montgomery County Residents.
2. No funds may be used or applied to capital expenses, equipment purchases, or for fund raising expenses

All Proposal applications submitted seeking **United Way of the Greater Dayton Area Impact** funding are subject to the following additional specific limitations:

1. All proposal applications must be submitted from approved United Way Partner Agencies. No proposals from non-Partner Agencies will be considered.

I. REQUIREMENTS FOR PROPOSERS

All proposal applications must be submitted with respect to the following requirements:

1. The proposer follows the submission requirements as outlined in this RFP and submits the completed proposal application including forms and documents in accordance with this RFP through the prescribed process.
2. The proposer complies with applicable local, state, and federal laws and regulations and meets applicable professional standards.

3. The proposer is an Equal Opportunity Employer and provides assurance that no person will be denied services on the basis of race, sex, color, creed, national origin, age or handicap. Facilities and services will be accessible to handicapped persons.
4. The proposer assures that confidentiality of client information is protected.
5. If the proposer is awarded a contract as a result of this RFP process, the organization must provide the following:
 - Periodic program and financial reports - the specifics and due dates will be explained at the time the award is granted
 - Assurance of liability coverage with Montgomery County, and or United Way of the Greater Dayton Area named as an additional insured

Specific to Montgomery County funding:

- A signed Declaration Regarding Material Assistance / No Assistance to a Terrorist Organization in accordance with Ohio Revised Code Section 2909.33

In addition, each organization receiving funding will be subject to on-site visits from program monitoring staff from Montgomery County and United Way of the Greater Dayton Area.

Questions regarding this Request for Proposals may be directed to:

Montgomery County Office of Family and Children First
451 West Third Street, 9th Floor
Dayton, Ohio 45422
937-225-4695

Montgomery County Office of Senior Services
1111 S, Edwin C. Moses Blvd.
Dayton, Ohio 45422
937-225-4948

United Way of the Greater Dayton Area
33 West First Street, Suite 500
Dayton, Ohio 45402
937-225-3051

Welcome to the 2012-2014 Joint RFP Online Application






Log In

- Open the email you received from jointrfpinfo@dayton-unitedway.org.
- Click on the word ONLINE LOG IN (it is blue and underlined).
- Please read your welcome letter.



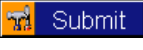
Menu Definitions

The menu is located on the left side of the page

- Click on 2012 RFP, and you will see the page shown in the box below.
- Click on Board to enter the Board Member name, address, dates of term, and Board Title (i.e., Chair, Treasurer, Member).
 - You will find directions on how to add Board Member information in the Board of Directors section of this manual.
- Click on Document Upload to upload all requested Organizational Documents.
 - You will find directions on which documents and how to upload them in the Document Upload section of this manual.
- Click on Manual to see or download a PDF version of this **2012-2014 REQUEST FOR PROPOSAL Online Application Manual**. The manual is located on United Way of the Greater Dayton Area Website's Joint RFP information page: <http://www.LiveUnitedDayton.org/RFP>.

2012 RFP	Packages		
Board			
Document Upload			
Manual			
RFP Information			
Signoff			
 United Way of the Greater Dayton Area			
Due Date		Description	Status
Mar 21, 2012	 	2012 RFP	Outstanding
Mar 21, 2012	 	2012 RFP Frail Elderly	Outstanding

Things to remember when working in the online system

- Do not use your back arrow in your browser window. If you do, Click refresh to the left of your address bar at the top of your screen, then Retry, and this will take you back to the online system.
- You must Click  at the bottom of your forms often – with inactivity, your system will time out. This is a setting on your individual computers. Please see your Information Technology Staff to adjust your settings if your system is timing out too quickly.
- To go see the list of Agency or program forms, Click on  at the bottom of the page, or Click 2012 RFP at the top of the Menu on the left side of your screen.
- The database reads apostrophes as squares. This is a bug in the system that we are working to correct. Volunteers and their Support Staff will be aware of this anomaly when reviewing your submission.
- Click  when you are completely done with the form you are in the process of completing. Once you Click submit, you cannot make any changes to your data. If you accidentally hit Submit, please contact Melonya Cook at (937) 225-3058 / melonyac@dayton-unitedway.org, or Melissa Bruck at (937) 225-3090 / melissab@dayton-unitedway.org) to unlock the form for you.

- You will know when all your forms have been completed by seeing the word COMPLETE instead of Outstanding beside each form name when you Click 2012 RFP on the left menu. As stated in the RFP instructions at the front of this manual, incomplete proposals will not be accepted for review. Each of the Agency and program forms must say COMPLETE for your proposal to be complete.

AGENCY FORMS

COMPLETE EACH AGENCY FORM ONE TIME ONLY

- Click on 2012 RFP on the left menu.

In the box called Packages:

- Click 2012 RFP if your program is applying for Supported Services and/or United Way funds.
- Click on 2012 Frail Elderly RFP if your program is applying for Frail Elderly funds.

Due Date		Description	Status
Mar 21, 2012		2012 RFP	Outstanding
Mar 21, 2012		2012 RFP Frail Elderly	Outstanding

2012 RFP or 2012 Frail Elderly RFP Package Screens:

- You will see your Agency name in the top box with 3 Agency forms listed below, with the word “Outstanding” by each form.

	Section	Status
	2012 Agency Information and Documentation	Outstanding
	2012-2013 Agency Proposed Budget	Outstanding
	2010-2011 Fiscal Year Agency Actual Budget	Outstanding

2012 Agency Information and Documentation Form

- Click [2012 Agency Information and Documentation](#) in the Forms List.
- Please respond to each question on this Agency form by Clicking in the box below or beside each question.

PLEASE NOTE:

TYPE OF ORGANIZATION:

- If your type of organization is not one of the available choices listed on the form, Click Other and type in the box to the right of the description of your organization.

2012 AGENCY PROGRAM(S) REQUESTING FUNDS

- Click yes or no to the option - is your Agency a United Way Partner? **(If no, your Agency may not request United Way funds for any program)**

- List EVERY program name for which your Agency will be submitting a 2012 RFP request from any or all Supported Services / Frail Elderly / United Way (SSF/FE/UW) funds. If you have received any SS/FE/UW funds in the past, please use the same program name; if you are renaming the program, put the old program in parentheses after the new name.
- List the total program request for funds by each funding source in dollars. **If you enter dollar amount in both Supported Services and United Way under one program name, that program will complete only one program application that will be reviewed by both the SSF/UW decision-making volunteers. (If you request SSF/FE funds, that program must also complete the 2012-2013 Supported Services or Frail Elderly Fund Request Expenditure Budget. United Way only requests do not need to complete this form.)**





2012 AGENCY BUDGET DETAILS



- Enter the Proposed 2012-2013 TOTAL AGENCY REVENUE in Dollars.
- Enter the % of each revenue stream in the boxes to the right of **Lines 1-8. The total of lines 1-8 in this section must equal 100% of your Agency's total revenue listed in the question above.**

TAX EXEMPT STATUS

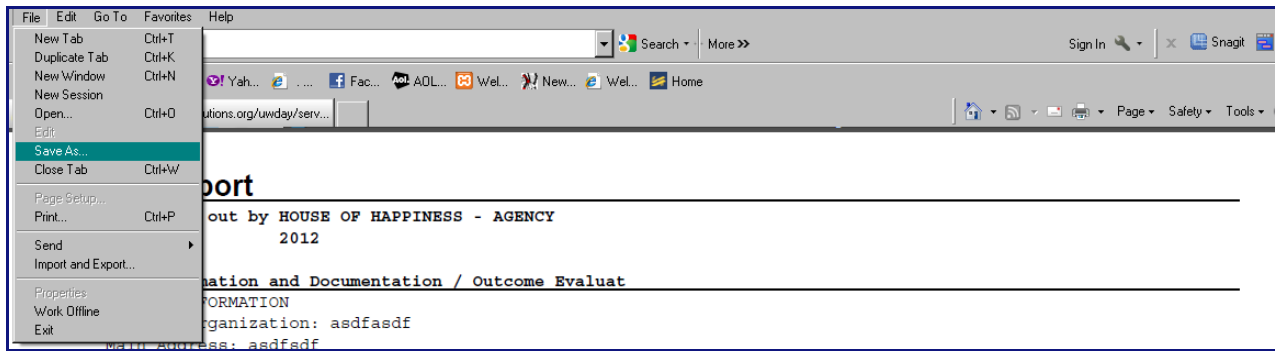
- Enter the date for each document listed (Copies of these and other Agency Documents will be uploaded into the system. Directions on how to upload will be in the Document Upload section of this manual.)

CERTIFICATION OF INFORMATION AUTHENTICITY

- Enter the date of signature electronically, OR you may leave this blank and write in the date of the signature.
- Click  to save all the data in the form.
- Click  at the bottom of the page when the form has been completed and needs no more changes.
- Click  at the bottom of the Agency Information and Documentation Form to go back to the Agency Form Listing
- Print this form only AFTER IT SAYS COMPLETED on the form list page.
- Click on the  button. A new web window will appear with a printable form.

Agency Information and Documentation			
		Form	Status
		Agency Information and Documentation	Completed

- Click File at the top of the PDF of the printable form.
- Click Save As; give the document a name, and Click save to save to your computer.



- Close the printable form window.
- Your Executive Director or Board President must sign and date this form.
- **Email/Fax/ hand deliver a signed and dated copy of the 2012 Agency Information and Documentation Form PDF prior to March 21, 2012 at 5:00 p.m.**
 - Email to jointrfpinfo@daytonunitedway.org prior to Wednesday, March 21, 2012 at 5:00 p.m., or
 - Fax to (937) 225-3074 prior to Wednesday, March 21, 2012 at 5:00 p.m., or
 - Hand-deliver to United Way's Office at 33 West First Street, Suite 500, Dayton, Ohio 45402 prior to Wednesday, March 21, 2012 at 5:00 p.m. **Please do not leave any hand deliveries without a receipt. The receipt must include name of recipient, date and time received.**

Each Agency must submit a signed and dated copy of the 2012 Agency Information and Documentation Form PDF prior to March 21, 2012 at 5:00 p.m. for your 2012 RFP to be considered complete.

AGENCY BUDGET FORMS







- 2012-2013 Proposed Agency Budget
- 2010-2011 Fiscal Year Actual Agency Budget Forms

EACH AGENCY MUST COMPLETE BOTH THE 2012-2013 PROPOSED AGENCY BUDGET AND 2010-2011 FISCAL YEAR ACTUAL AGENCY BUDGET

- Click on one of the budget form names.

2012 RFP - Package

House of Happiness - Agency




		Section	Status
		2012 Agency Information and Documentation	Outstanding
		2012-2013 Agency Proposed Budget	Outstanding
		2010-2011 Fiscal Year Agency Actual Budget	Outstanding

PLEASE NOTE:




- In each of the Agency Budget forms, enter an itemized budget for the **TOTAL AGENCY**.
- When entering the total amount of 2012 RFP requests to SSF/FE/UW, remember: only United Way partners can apply for UW funds.

2012-2013 Proposed Agency Budget

Item	Description	Amount	Side
1	Supportive Services Request	\$0.00	Income
1.5	Frail Elderly Request	\$0.00	Income
2	United Way Request	\$0.00	Income

- The totals of income and expense and any surplus/deficit will calculate for you at the bottom of each budget form.
- Click  to save all the data in the form.
- Click  at the bottom of the page when the form has been completed and needs no more changes.
- Click  at the bottom of page to return to the Form List.

2801	Consultants/Professional Services	\$0.00	Ex
	Total Income	\$0.00	
	Total Expense	\$0.00	
	Total Surplus/Deficit	\$0.00	














 Save
 Submit
 Return

PROGRAM PROPOSAL FORMS

COMPLETE ONE SET OF PROGRAM FORMS FOR EACH PROGRAM FOR WHICH YOU ARE REQUESTING FUNDS















In the box called Packages: (Click on 2012 RFP, or Click return at the bottom of any form to see this screen)

- Click 2012 RFP if your program is applying for Supported Services and/or United Way funds.
- Click on 2012 Frail Elderly RFP if your program is applying for Frail Elderly funds.

2012 RFP Board Document Upload Manual RFP Information Signoff  United Way of the Greater Dayton Area	<h3>Packages</h3>												
	<table border="1"> <thead> <tr> <th>Due Date</th> <th></th> <th>Description</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Mar 21, 2012</td> <td> </td> <td>2012 RFP</td> <td>Outstanding</td> </tr> <tr> <td>Mar 21, 2012</td> <td> </td> <td>2012 RFP Frail Elderly</td> <td>Outstanding</td> </tr> </tbody> </table>	Due Date		Description	Status	Mar 21, 2012	 	2012 RFP	Outstanding	Mar 21, 2012	 	2012 RFP Frail Elderly	Outstanding
Due Date		Description	Status										
Mar 21, 2012	 	2012 RFP	Outstanding										
Mar 21, 2012	 	2012 RFP Frail Elderly	Outstanding										




You will see the list of Agency Forms first. Each of the Programs that you are applying for will be in the list with a set of forms directly under each program name.

COMPLETE ONE SET OF PROGRAM FORMS FOR EACH PROGRAM FOR WHICH YOU ARE REQUESTING FUNDS.

Apples and Oranges - Program			
		Section	Status
		2012 Combined Application	Outstanding
		Inputs	Outstanding
		Activities	Outstanding
		Outcomes	Outstanding
		Indicators	Outstanding
		2012 Age Proposed Demographic (Total = 0)	Outstanding
		2012 Counties Proposed Demographic (Total = 0)	Outstanding
		2012 Race Proposed Demographic (Total = 0)	Outstanding
		2012 Gender Proposed Demographic (Total = 0)	Outstanding
		2012 Income Level Proposed Demographic (Total = 0)	Outstanding
		2012 Zip Codes Proposed Demographic (Total = 0)	Outstanding
		2012 Health Insurance Proposed Demographic (Total = 0)	Outstanding
		2012-2013 Program Proposed Budget	Outstanding
		2010-2011 Fiscal Year Program Actual Budget	Outstanding
		Program Budget Narrative	Outstanding
		2012 -2013 Supportive Services or Frail Elderly Request Expenditure Budget	Outstanding
		Program Revenue Funds Reporting Form	Outstanding
Happily Ever After - Program			
		Section	Status
		2012 Combined Application	Outstanding
		Inputs	Outstanding

2012 Combined Application Form

- Click 2012 Combined Application Form.
- Enter a response for each question in the box below or to the right of that question.

2012 Combined Application	
Form	Status
   2012 Combined Application	Outstanding
Name of Program	<input type="text"/>
Program Contact Person: (Person responsible for program)	<input type="text"/>
Program Address (Actual site of program if different than main address)	<input type="text"/>
City, State, Zip	<input type="text"/>
Telephone:	<input type="text" value="0"/>

Please Note:

PART 1- Description of Program/Project

Brief Summary: The system will only allow you to enter a maximum of 300 words in the brief summary description (abstract).




Level of Service: Please choose which of these three levels of service this program provides, and choose it from the drop down menu to the right of the question.

- Prevention refers to activities that avert a problem from arising in the first place.
- Early intervention refers to stopping or ending a problem which exists, but is in an early stage of development. (This definition does not relate to the age of a child.)
- Intervention is the act of intervening or interceding with the intent of ending the problem or controlling it to prevent long-term damage or disability.

PART 3 – Collaboration

- Please limit your program collaborations - only list the three to five most direct collaborations.

When you have completely answered each question:

- Click  to save all the data in the form.
- Click  at the bottom of the page when the form has been completed and needs no more changes.
- Click  at the bottom of page to return to the Program Form List.

OUTCOME EVALUATION

If you need assistance with Outcome Evaluation, you may purchase the “Measuring Program Outcomes: A Practical Approach” Workbook for \$5.00 by emailing Melonya Cook at United Way of the Greater Dayton Area (melonyac@dayton-unitedway.org).


INPUTS


Inputs are the resources dedicated to or consumed by the program. This means anything that influences the ability of the Agency to implement the program.


Adding Inputs:

- Click Inputs on the Program Forms List.
- Click Add below the Input directions.

No Inputs exist for this year with this Input type


 Add


 Submit

 Return

- **Facilities:** Please list any space that is needed to implement the program.
 - If you have satellite offices or use space at another Agency, please describe this in the description box. Please use Comment field for longer explanations.
- **Constraints:** Please list any constraints, other than financial, that affect the ability of the Agency to implement the program.
 - In the comment section, please note whether these constraints are pending or already met. Include a P for pending or M for met after the listing of the constraint. Examples of constraints are zoning laws, certifications, licensing requirements, etc.
- **Staff:** Please list all staff dedicated to this program that you will include in the program budget.
 - Please list the number of full-time staff and the description. Use the comment field for longer explanations.
 - Add a new input for part-time or other staffing. Please describe each new input and use the comment field for longer explanations.
- **Volunteers:** Please be sure to describe any volunteers that are necessary to implement the program.


Year	2012
Type	Proposed
Input Category	Staff
Description	Full Time
Amount/Number	5
Comment	2- Playground Monitors 3- Parent Educators


 Add




 Cancel

Updating or Deleting Inputs




Please Note:

- If you want to make changes to the input data you have entered, Click on the underlined words in the description box.
- To delete an input after you have added an input, Click the .

	Input Category	Description	Amount
	Staff	<u>Full time</u>	2.00

 Add
 Submit
 Return

When you have completed entering all the inputs in each category:

- Click  Save to save all the data in the form.
- Click  Submit at the bottom of the page when the form has been completed and needs no more changes.
- Click  Return at the bottom of page to return to the Program Form List

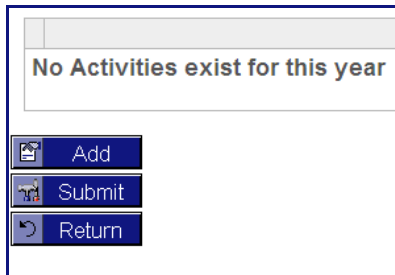
ACTIVITIES

Program activities are the actions taken and tasks performed to fulfill a program's mission.

- Be sure to list all significant activities (maximum of 10) that will directly affect the achievement of any Outcome/Indicator and, when performed, will be related to a cost to the program. Example: Provide after-school tutoring for 12-18 year old students.

To add an Activity:

- Click Activities on the Program Form List page.
- Click Add after the Activity Directions you see on your screen.



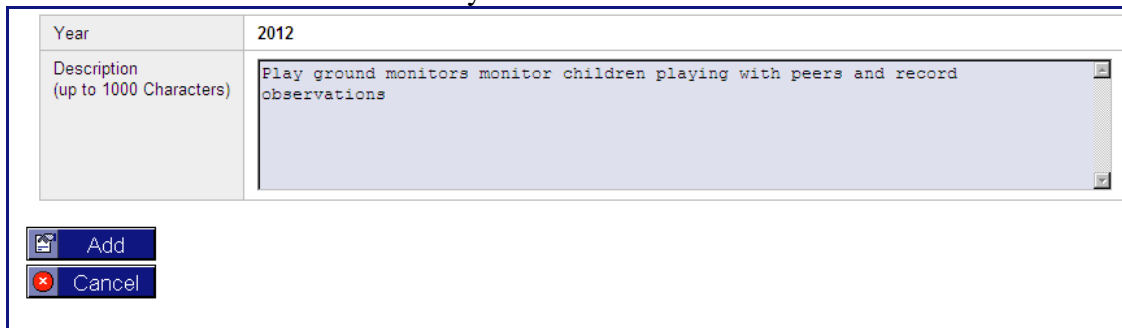
No Activities exist for this year

Add

Submit

Return

- Enter the first activity.
- Click Add to save the activity.



Year	2012
Description (up to 1000 Characters)	Play ground monitors monitor children playing with peers and record observations

Add

Cancel

A new screen will come up, and your activity will be in the top box.

Now you must add an Output. Each Activity must have an output.

OUTPUT

Program Outputs are the direct product or results of a program activity once it has been performed.




- An output is always stated in past tense.
- Each output must have a defined numerical value. For example: 50 Students received after-school tutoring.
- **NOTE: THERE MUST BE A NUMERICAL VALUE FOR EACH OUTPUT.** This number is the value of what was produced from each activity listed.
- The total numerical value of program Outputs, when multiplied by the unit of service cost, should equal the total program cost.

Do not add activities or Outputs that do not link to a direct cost to the program.

This is a program management strategy to assist you in defining the unit of service cost and discovering the true cost for implementing the program and calculating the unit of service cost.



The total numerical value of program Outputs, when multiplied by the unit of service cost, should equal the total program cost.

To add an Output

- Click  in the output box below the activity box.
- You will see a new screen.
- Click in the Name field and enter the output (remember to use past tense for the activity).
- In the box marked Unit of Service, list the total number of the output.
- Click update.
- To add more Outputs, either enter a new activity and follow the steps above, or Click on an underlined activity description that has already been added. Then follow the steps outlined above.
- NOTE: When you have completed entering all of the Outputs and you are sure you do not need to make any changes, Click  to submit the proposed output. This must be completed for each Output entry. Activities must be saved using the  button on the screen showing all the activities you have entered. Do not submit until all changes have been made.



When you have completed entering all Activities and Outputs:

- Click  to save all the data in the form.
- Click  at the bottom of the page when the form has been completed and needs no more changes.

Click  at the bottom of page to return to the Program Form List.

OUTCOMES

Outcomes are broad statements that show positive benefit or change that is a result from participating in a program.


- Outcomes are stated in chronological order of Initial, Intermediate, and Long Term. If a client can not achieve the initial Outcome, they will not achieve the Intermediate or Long Term Outcome.


Initial Outcome	Intermediate Outcome	Long Term Outcome
<p>The first benefit(s) or change(s) participants' experience and are the ones most closely related to and influenced by the program's Outputs. Outcomes capture changes in participants' knowledge, attitudes or skills. Example: Teens are knowledgeable of prenatal nutrition and health guidelines</p>	<p>Link a program's initial Outcomes to the longer-term Outcomes it desires for participants. Intermediate Outcomes capture changes in behavior that result from participants' new knowledge, attitudes or skills gained in the initial Outcome. Example: Teens follow proper nutrition and healthy guidelines.</p>	<p>The ultimate Outcomes a program desires to achieve for its participants. They represent meaningful changes for participants. The programs Long Term Outcome(s) are the most removed benefits that it can reasonably expect to influence. Long Term Outcomes build logically from the initial Outcome to Intermediate Outcome. Example: 1) Teens deliver health babies. 2) Babies born to teen mothers achieve appropriate 12 month milestones for physical, motor, verbal, and social development.</p>


Add a new Outcome

- Click Outcome on the Program Form List.
- Click Add.

No Outcomes exist for this year


 Add


 Submit


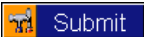
 Return


- Choose which level of Outcome you will enter first.
- Click in the Program Outcome field and enter an Outcome.
- Click Add.
- Complete these steps for each Outcome Level. Every program must have a minimum of three Outcomes.

Year	2012
Scope	Short term
Program Outcome (up to 1000 Characters)	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div>
Sequence#	100

 Add

 Cancel

- Click  Save to save all the Outcomes in the form.
- Click  Submit at the bottom of the page when the form has been completed and needs no more changes.

- Click  at the bottom of page to return to the Program Form List

INDICATORS

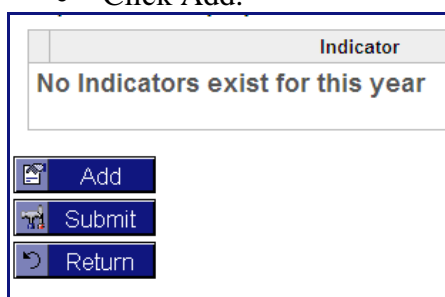
The purpose of an Indicator is to tell the program if the Outcome has been achieved. All Indicators must be a specific observable, measureable characteristic or change that will represent achievement of an Outcome. Indicators include the specific numerical values (statistics) the program will calculate to identify the level of achievement.

Please Note:

- Each Outcome must have one Indicator linked to it.
- You may have more than one Indicator linked to an Outcome. Please do not link more than 2 indicators to any Outcome.

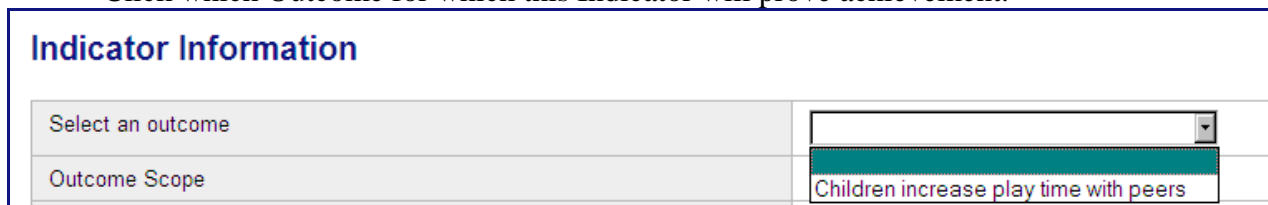
To add an Indicator:

- Click Indicator on the Program Form List.
- Click Add.



The screenshot shows a web interface for managing indicators. At the top, there is a header labeled 'Indicator'. Below the header, a message states 'No Indicators exist for this year'. At the bottom of the interface, there are three buttons: 'Add', 'Submit', and 'Return', each with a small icon to its left.

- Click on the drop down box that says Select an Outcome that is located in the top of the bottom box you see on the screen.
- Click which Outcome for which this Indicator will prove achievement.



The screenshot shows the 'Indicator Information' form. It has a title 'Indicator Information' in blue. Below the title, there are two main sections. The first section is labeled 'Select an outcome' and contains a dropdown menu. The second section is labeled 'Outcome Scope' and contains a text input field. The dropdown menu is open, showing a list of outcomes, with 'Children increase play time with peers' selected and highlighted in green.

- Click in the box beside Program Indicator and add a measureable, observable Indicator. For Example: Number of teen mothers who show increased knowledge in prenatal nutrition and health guidelines by increasing the score on the Prenatal Knowledge Post test.
- **Add each of these Indicator Data Collection Items for each Indicator.**

Data Source is the person/entity reporting the Indicator data.

Example: Participant or case manager. If there is more than once source, please list all sources. This is where you will get the data for each of your Indicators. This may be a trained observer, records, specific individuals, etc.

- Add a **Data Source** for each Indicator below the Program Indicator box.

Data Collection Tool is the name of the instrument that you will use to collect the data.

Examples of data collection tools are pre/post test, survey, client records, etc.

- Add the **Data Collection Tool**.

Data Collection Process is the process the program staff will use to know when, where, and how to collect the data. **Example:** The senior participant will take the pre/test immediately following the first appointment. The case manager will administer the pre/test verbally in private. The case manager will document all pre- and post-test scores in the client file and in the database. The post/test will be given at the final appointment following the same format and collection as the pretest. **(Note how this is written and can be taken right from your activity and output section. These are summaries of activities that are direct program costs. This is another important piece when using Outcome Evaluation as a program management tool).**

- Add the **Data Collection Process**.


Analysis Method is a brief explanation of how your data will be tabulated prior to being reported.

Example: The total number of seniors who took the pretest and the post-test will be counted and reported as the Actual Base Number. The total number of those seniors who scored more than a 10 on the post-test will be counted and reported as the Actual Achievement Number. This will be the number of individuals that achieved the Outcome.

- Add an **Analysis**.

Timeline is the timeframe for the entire Outcome from beginning to achievement, how often the results will be tabulated, and how often the results will be reported to funders, your board, and the community. **Example:** This Outcome will begin being measured per individual upon collection of pretest. It will be concluded upon the completion of the post/test per individual. The results of this Outcome will be tabulated every 30 days, reported to the board every 90 days, and reported to funders semi-annually and annually. Add a **Timeline**.

Indicator Information	
Select an outcome	<input type="text" value=""/>
Outcome Scope	
Year	2012
Program Indicator (up to 1000 Characters)	<input type="text" value=""/>
Data Source	<input type="text" value=""/>
Data Collection Tool	<input type="text" value=""/>
Data Collection Process	<input type="text" value=""/>
Analysis Method	<input type="text" value=""/>
Timeline	<input type="text" value=""/>

 Add

Indicator Measurement Numbers




Target Base Number for all Indicators: Each Indicator must have a **target base number**. The Target base number is the total number of Indicator specific subjects. For example: Nine of Ten callers report their needs were met. Ten is the base number because we have data for ten callers. (Or) Second time callers report their needs were met. The total number of second time callers would be the base, and the total number of those that reported having their needs met would be the **achievement number**.

Target Achievement Number for all Indicators: Each Indicator must have a **target achievement number**. The Target Achievement number is the total number of achievers projected for the Indicator. For example: Nine of Ten callers report their needs were met. Nine is the total number of projected achievers. (Or) Second time callers report their needs were met. The total number of second time callers would be the cohort, and the total number of those that reported having their needs met would be the **actual achievement number**. **In the end of the year report, each Indicator will have an actual achievement number reported.**

To add Indicator Measurement Numbers


- In the top box of the indicator page, enter the target base number in the field called T-Base.
- Enter the Target Achievement number in the field called I- Achieved.
- DO NOT ADD ANYMORE DATA TO THE EMPTY FIELDS IN THIS AREA.
- THERE IS NO DUE DATE TO BE ENTERED HERE.
- Click Submit when you are sure you do not need to change either number entered into this form section.

Add New Indicator	
Measurements	
	Target
T-Base #	<input type="text" value="0"/>
Percent	<input type="text" value="0"/>
I-Achieved	<input type="text" value="0"/>
S-Base #	<input type="text" value="0"/>
S-Percent	<input type="text" value="0"/>
S-Achieve #	<input type="text" value="0"/>
Comment	<input type="text"/>
Due Date	<input type="text"/>
<input type="button" value="Submit"/>	
Indicator Information	

- Click  to save all the Indicator data entered in the form.
- Click  at the bottom of the page when the form has been completed and needs no more changes.
- Click  at the bottom of page to return to the Add a new indicator page.
- Complete the steps above until you have added a minimum of one Indicator to each Outcome.

- From the Add a new indicator page, Click  at the bottom of page to return to the Form Listing.

Updating or Deleting Indicators

- If you want to make changes to the input data you have entered, Click on the underlined words in the description box.
- To delete an input after you have added an input, Click the .

	Indicator	Outcome	Scope
	<u>kids</u>	kids	Intermediate




Demographics

There are 7 Demographic Categories, each with their own form. Please follow the directions below to complete all 7 Demographic Forms.

For Frail and Elderly Programs, there are 8 Demographic forms to complete.

- Click a Demographic Form on the Program Form List.
- Enter an itemized number of clients you expect to serve in 2012-2013.
- The form adds totals for you. The total on each form should be the same.
- Please note an additional demographic category of Health Insurance Status.

We encourage the program to collect all demographic information requested in these forms.

- Click  Save to save all the data in the form.
- Click  Submit at the bottom of the page when the form has been completed and needs no more changes.
- Click  Return at the bottom of page to return to the Program Form List and choose the next demographic category form.
- Each demographic form must say complete on the Form List for your program proposal to be complete.

Financial Forms

Please note:

This list is for Programs who are applying **Supported Services and Frail Elderly Funds**. **This list does not apply to United Way Funds.**

Supported Services and Frail Elderly Funds Unallowable Costs

Unallowable Costs – Supported Services Funds may be expended only for the direct delivery of services. Supported Services funding can not be used for the following expenses:




- Bad Debt - Losses arising from uncollected accounts and other claims and related costs are unallowable.
- Contingencies - Contributions to a contingency reserve or any similar provision for unforeseen events are unallowable.
- Capital Expenditures or Equipment Purchases - Material and supplies which will not be exhausted within one year are unallowable.
- Contributions and Donations - Outlays of cash with no prospective benefit to the Agency or program are unallowable.
- Entertainments - Cost of amusements, social activities, and related cost are unallowable.
- Advertising - Costs of advertising (with the exception of contract-related recruitment needs), procurement of scarce items, disposal of scrap and surplus is unallowable.
- Fines, Penalties and Court Judgments - Costs resulting from violations of or failure to comply with laws and regulations are unallowable.
- Interest and Other Financial Costs - Interest on borrowings, bond discounts, or any costs of financial or refinancing operations are unallowable.
- Costs Borne by Other Federal or State Programs - Any costs specifically subsidized by federal or state monies are unallowable.
- Cash Payments - Cash payments to eligible individuals (e.g., cash allowance to children in residential treatment) are unallowable.
- Sabbatical Leave - Payment of any sabbatical leave is unallowable.
- Fundraising - Cost associated with activities to raise monies to support the provider program is unallowable.
- Education - Cost associated with activities provided for public educational instruction that are free of charge to the general public is unallowable.

2012-2013 Program Proposed Budget
2010-2011 Fiscal Year Actual Budget

An itemized budget is inclusive of all service(s) being proposed. The program budget must reflect the revenues and expenses for all service(s) being provided.

- Click on one of the 2 Program Budget forms in the Forms List.
- Enter an itemized Proposed Program Budget for July 1, 2012 – June 30, 2013 in the 2012-2013 Program Proposed Budget.
- Enter an itemized Actual Program Budget for July 1, 2010 – June 30, 2011 in the 2010-2011 Fiscal Year Actual Budget.
- When entering the total amount of 2012 RFP requests to SSF/FE/UW, remember only United Way partners can apply for UW funds.

2012-2013 Proposed Program Budget			
Item	Description	Amount	Side
1	Supportive Services Request	\$0.00	Income
1.5	Frail Elderly Request	\$0.00	Income
2	United Way Request	\$0.00	Income




- The totals of income and expense and any surplus/deficit will calculate for you at the bottom of each budget form.
- Click  Save to save all the data in the form.
- Click  Submit at the bottom of the page when the form has been completed and needs no more changes.
- Click  Return at the bottom of page to return to the Form List.

Program Budget Narrative

This is your opportunity to explain any item in the budget that will help the fund decision making volunteers better understand your program and your need for Supported Services, Frail Elderly, and/or United Way funding.

Unit of Service: The Unit of service is specific to a program. It is a measure of service delivered. Units of service are determined from all the costs assigned to the program. Example: cost of one hour of service, one shelter night, on meal, client day in facility, child care day, one hour of consultation, etc.




To complete the Budget Narrative:

- Click on the Budget Narrative Form in the Forms List.
- Respond to each question by answering in the text box below it.
- Click  Save to save all the data in the form.
- Click  Submit at the bottom of the page when the form has been completed and needs no more changes.
- Click  Return at the bottom of page to return to the Form List.

2012-2013 Supported Services or Frail Elderly Request Expenditure Budget




TO BE COMPLETED BY Program requesting funds from SUPPORTED SERVICES REQUESTS or FRAIL ELDERLY only.

Programs requesting United Way Funds should not complete this form.

- Click on the 2012-2013 Supported Services or Frail Elderly Request Expenditure Budget Form in the Forms List.
- Enter the total amount of your Supported Services Request or Frail Elderly Request.
- Enter the expenses related to ONLY the Supported Services or Frail Elderly Request.
- Click  to save all the data in the form.
- Click  at the bottom of the page when the form has been completed and needs no more changes.
- Click  at the bottom of page to return to the Form List.

The form totals for you at the bottom. Note: Surplus/Deficit must be 0.

2012-2013 Supportive Services or Frail Elderly Request Expenditure Budget			
Item	Description	Amount	Side
0	Supportive Services or Frail Elderly Request (DO NOT INCLUDE ANY REQUEST TO UNITED WAY IN THIS FORM)	\$0.00	Income
1	Salaries	\$0.00	Expense
2	Fringe Benefits	\$0.00	Expense
3	Travel	\$0.00	Expense
4	Consumable Supplies	\$0.00	Expense
5	Occupancy	\$0.00	Expense
6	Insurance	\$0.00	Expense
7	Indirect Costs (Cannot exceed 10% of Expenditures of SSF or FE Funding)	\$0.00	Expense
8	Consultation Expenses (please include explanation in budget narrative)	\$0.00	Expense
9	Other (please include explanation in budget narrative)	\$0.00	Expense
	Total Income	\$0.00	
	Total Expense	\$0.00	
	Total Surplus/Deficit	\$0.00	






Program Revenue Funds Reporting Form




















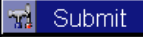

- Click  in the top box of the Program Revenue funds Reporting form to Complete a new form for each of the Program Revenue Funding Sources for budget revenue listed in the 2012 Proposed Program Budget.






- Click  in the top box of the Program Revenue funds Reporting form to Complete a new form for each of the Program Revenue Funding Sources for budget revenue listed in the 2012 Proposed Program Budget.
 - Only report funds \$10,000 and over.

For each Revenue Source:



- Choose the Source of funds from the drop down menu.
- Please list the name/description of the funding source.
- Enter the amount of funds requested/received in dollars.
- Choose the Status of these funds from the drop down menu.
- Click  Save to save all the data in the form.
- Click  Submit at the bottom of the page when the form has been completed and needs no more changes.
- Click  Return at the bottom of page to return to the Form List.



				Form
				Revenue Funds Reporting Form
				Revenue Funds Reporting Form
				Revenue Funds Reporting Form
				Revenue Funds Reporting Form
1. Program Revenue Funding Sources: For budget revenue listed in the 2012 Proposed Program Budget. Only report funds \$10,000 and over. Please list the funding source, the name or description of the funding source, the amount of funds requested/received, and if the funds are confirmed or pending.				
a) Source of Funds				Federal ▾
b) Name/Description of funding source: (i.e. Title XX, CBDG, Dayton Foundation, TANF, etc)				
c) Dollar amount of funds pending or confirmed:				\$0.00
d) Status				Pending ▾
 Save  Submit  Return				


Board

- Click on **Board** on the left menu
- Click  **Add**
- Enter Board Member Information requested in the form.
- Click **Add**.
- Repeat these steps until all members of your Agency Board of Directors have been saved.
- Click  **Save** to save all the data in the form.
- Click  **Submit** at the bottom of the page when the form has been completed and needs no more changes.

Update or Delete Board Member

- If you want to make changes to the data you have entered, Click .
- To delete a record after you have added, Click the .

		Name
		d, d

 **Add**

Document Upload

TIP: Put all documents you must upload in the online system in one folder prior to beginning to upload.

Documents to Upload include:

- Organization Financial Statement: Revenue & Expense Statement (for your most recently completed fiscal year)
- Most Recent Completed IRS Tax Return (Treasury 990 or any other)
 - Most recent: **for a period ended not more than 18 months prior to January 2011 (i.e. ending on or after June 30, 2009)**
- Most Recent Audit Report
 - Most Recent: **for a period ended not more than 18 months prior to January 2011 (i.e. ending on or after June 30, 2009)**
- Table of Organization for Entire Organization
- Table of Organization for Proposed Services
- Document with a bulleted list of license, certifications, trainings, professional memberships, and affiliations for staff, if applicable
- Letter of Assurance regarding organizational compliance with state and federal laws and regulations
- Equal Employment Opportunity Statement

To Complete Document Uploads:

- Click on Document Upload on the left menus.
- Click Add.
- Click Browse.
- Find your document on your computer; double-Click on it.
- In the description, write the name of the document.
- Click Add.
- Repeat the steps until the document upload list you see shows all documents requested in this proposal have been uploaded.


The image shows a software dialog box with the following components:

- Title:** Description
- Text Area:** A large, empty rectangular box for entering text.
- File Name:** A text input field.
- Browse...:** A button next to the File Name field.
- Add:** A button with a plus icon and the text 'Add'.
- Cancel:** A button with a red X icon and the text 'Cancel'.

My Profile Report

This is the report menu. This report form will allow you to mark each form you completed online and run a downloadable/printable report for your records. This report will be in 8 pt. font. This is not the report that funding volunteers will receive when they read your proposal.

You can rerun and print this report as many times as you wish.

- Click My profile Report in the left menu.
- Click on the boxes in the form that you would like in your report.
- You must Click subsidiary box if you want program forms and Agency forms in your report.
- You must Click  to add each budget type you would like in your report.
 - 2012 Proposed Agency
 - 2011 Actual Agency
 - 2012 Proposed Program
 - 2011 Actual Program

Demographics Proposed

- UNCHECK FUNDING TYPE.
- Check Forms.
- Check Outcomes/Indicators.
- Check Inputs.
- UNCHECK DESCRIPTION TYPE.
- UNCHECK PUBLISHED AND EXPIRED.
- Click Run Report.

7:49 s... X New Tab

Include subsidiaries

Reports

Budget*

Include Agency Total Include Calculated Agency Total Include P

Year	Budget Type	Budget Class
2012	Actual	Actual Agency

Demographics Type
Proposed

Funding Type*
Proposed

Forms

Outcomes/Indicators*

Activities/Outputs*

Inputs*

Description Type
Community Building
 Published Include Expired

Report Type: Acrobat (PDF) Format

*This particular report option is not available in CSV format.

Run Report

When your report is running, you will see this message at the top of the page:

Profile Report

Report has been submitted for processing and will be available on the output page upon completion.

Education Impact Council (Priority Team)
Education United Way and County Funding Category (Funding Category)

House of Happiness (2579183 - Agency)
184 Salem Ave
Marketing Dept
Dayton OH 45406

open all | close all

- House of Happiness (2579183 - Agency)
 - Apples and Oranges (2842953 - Program)
 - Happily Ever After (2584993 - Program)

Year: 2012

My Outputs

- Click on My Outputs on the left menu.
- This is a list of all reports you have run in the system.
- Another option to print forms is on the Form List Page; you can Click the beside the form name.

CLICK SIGN OUT WHEN YOU READY TO LOG OFF FOR THE DAY.