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Purpose of Document

The purpose of this document is to equip community volunteers for their role as Community Impact Panelists. By understanding the Mission and Vision, Community Investment Strategies, Priority Impact Areas and commitment to serving the ALICE population, panelists will be prepared to make thoughtful funding decisions.
Livingston County United Way

Executive Summary

At United Way, we initiate conversations in and about the community around its most pressing social dilemmas. These barriers can’t be solved in a day, in a boardroom, or without community collaboration. People are complex. Problems are complex. There’s no single or simple solution – and that’s where we step in.

As a connector and catalyst, Livingston County United Way brings all sectors of the community together to extend their reach and amplify their impact – which leverages the impact of every dollar donated.

With so much happening behind the scenes, there are limitless ways to get involved. Whether you share your time, talent, or treasure, an investment in United Way goes where it’s needed, to those who need it most.

Livingston County United Way invests more than $1.2 million into the community each year. We continue to be committed to distributing funds via a strategic investment process. On the following pages is an outline of our new Community Impact Priorities and our Community Investment Process.

THE VISION OF LIVINGSTON COUNTY UNITED WAY...

Livingston County is a great place to grow up, a great place to raise a family and a great place to retire, for everyone.

THE MISSION OF LIVINGSTON COUNTY UNITED WAY...

Livingston County United Way brings people together to build stronger communities and improve lives.
Invest in Quality Programs to Support Prevention, Youth and Low-Income Working Families

**Collateral**
- Donations
- Volunteers

- Focused on individuals
- Program Level
- Short-term
- Results are immediate
- Benefits the individual/family

**Invest in Community Asset-Building to Support the Modern Economy**

**Collateral**
- Donations
- Volunteers
- Staff
- Expertise

- Focused on populations of people
- System Level
- Longer-term
- Collective

- Results are progressive, develop over time
- Benefits groups of people
- Cost savings, efficiencies, leveraging

**Invest in Coalitions and Initiatives to Improve Systems and Foster Innovation**

**Collateral**
- Donations
- Volunteers
- Staff
- Expertise
- Advocacy
- Leadership

- Focused on assets, infrastructure
- Community level
- Visionary, perpetual
- Collective, strategic, complex

- Results are permanent; level the playing field
- Benefits the entire community
- Economic development, quality of life, vibrant community

CHANGE LIVES

CHANGE SYSTEMS

CHANGE THE COMMUNITY
Community Impact Areas Overview

The United Way is a driving force of change in Livingston County. We help bring together nonprofits, governmental agencies, churches and other organizations to address the most pressing needs in our community. We focus our efforts in three areas of impact: Thriving Families, Successful Youth and Health & Wellness.

THRIVING FAMILIES
Empowering families with resources that allow them to support themselves.

SUCCESSFUL YOUTH
Assuring that children birth-18 have access to good education, food, fitness and overall health.

HEALTH & WELLNESS
Energizing all residents, young and old, to be healthy, secure and active in their community.
ALICE FOCUS

In Livingston County, about 21,800 households or 26% of households’ struggle to survive while working one, two, or even three jobs. Combine those households with the number living below the U.S poverty guidelines and this makes up 31% of all households in Livingston County. This number has continued to increase since 2012, causing us to take notice and begin to thoroughly explore the barriers facing this population.

This population was identified through the ALICE (Asset Limited Income Constrained Employed) study, conducted in a joint effort between United Way and Rutgers University, and is defined as households that earn more than the U.S poverty level, but less than the basic cost of living for the county.

We know that nearly 1 in 4 households in Livingston County struggle to attain financial stability, to get out of the cycle of living paycheck to paycheck, and live in fear of even the smallest crisis putting them at significant financial risk. These are people that are working, but fall through the cracks. They often make too much to qualify for government and private programs, but too little to meet some of their family’s most basic needs.
While the application process is open to all non-profit agencies, priority will be given to agencies that can provide high-quality programming, an ability to achieve outcomes, and a proven commitment to serve or are working to address the barriers facing the ALICE population with their requested dollars.

Funding Criteria

United Way provides funding to agencies that demonstrate a commitment to providing high-quality programming and an ability to achieve outcomes in one or more of our impact areas of thriving families, successful youth and health & wellness.

While the application process is open to all non-profit agencies, priority consideration will go to agencies committed to serving the ALICE population with their requested dollars, or those who are working to address the barriers facing ALICE individuals.

Each agency submitting a full application for funding will be required to track and report results as outlined in Appendix A. Applicants should review the outcomes and indicators to identify the primary strategy with which the proposed application aligns.

Awards made under this announcement are subject to the availability of United Way campaign funds each year.
Grant Evaluation

Agencies will be evaluated by United Way volunteers using the following criteria:

1. Agency Alignment
2. Target Population
3. Impact/Outcome Alignment
4. Organization Capacity
5. Measurement
6. Funding Request/Budget
7. Agency Partnership with United Way
8. ALICE/Working Households commitment
9. Panel Presentation
   (see Appendix C for guidelines)
Thoughtful Questions - Coalition Panels

- What have these funds allowed the coalition to do?
- What has been different about the multi-year funding?
- How does the coalition demonstrate its responsibility for the most effective use of funds?
- How does the work focus more on prevention?
- Are we confident in what the coalition is doing?
- How is the system working?
- Is the coalition achieving the outcomes as planned?
- What are the metrics trying to tell us?
Appendix A

Funding Priority Outcomes and Required Indicators

Thriving Families:

Outcomes:
- Individuals gain employment.
- Veterans gain employment.
- Individuals increase their wages.
- Individuals increase their disposable income by accessing benefits and/or reducing costs.
- Total dollar amount of refunds to individuals/families through VITA and/or MyFreeTaxes.
- Individuals served earn job-related licenses, certificates, and/or credentials.

Performance Indicators:
- Number of Individuals who receive job skills training, supported by Livingston County United Way.
- Number of individuals served who access affordable housing, financial products and services, supported by Livingston County United Way.
- Number of financial sector staff trained to provide quality services, supported by Livingston County United Way.

Health & Wellness:

Outcomes:
- Children and adults served will eat healthier, increase their physical activity, and/or move towards a healthy weight.
- Babies served will experience healthy birth outcomes (celebrate their 1st birthday, carried to full term, born at a healthy weight).
- Youth and adults served will avoid or reduce risky behaviors.

Performance Indicators:
- Number of individuals served who participate in physical activity and/or healthy food access/nutrition programs, supported by Livingston County United Way.
- Number of individuals served with access to healthcare services and supports, supported by Livingston County United Way.
- Number of individuals served with access to healthcare insurance, supported by Livingston County United Way.
- Number of Health sector staff trained to provide quality services, supported by Livingston County United Way.
Appendix A-continued

Funding Priority Outcomes and Required Indicators

Successful Youth:

Outcomes:

- Children achieve developmental milestones.
- Children are proficient on school readiness assessment by the end of their kindergarten year.
- Children read at grade level.
- Children and Youth maintain satisfactory or improved school attendance.
- Youth graduate on time.
- Youth served gain, post-secondary employment, further education, or credentials.
- Middle School/High School students served earn passing grades in core subject areas.
- Middle School/High School students develop soft skills.
- Youth transition from Middle School to High School on time.

Performance Indicators:

- Number of children (0-5) enrolled in high-quality childhood programs supported by Livingston County United Way.
- Number of children served, receiving literacy supports K-3, supported by Livingston County United Way.
- Number of families, caregivers, served that are provided with information, resources, tools, trainings, and/or teaching skills, supported by Livingston County United Way.
- Number of early childhood staff trained to provide quality services, supported by Livingston County United Way.
- Number of school-aged youth who participate in school and/or community-based out-of-school time programs, or receive individualized supports, supported by Livingston County United Way.
- Number of youth who receive job skills training, supported by Livingston County United Way.
- Number of youth development staff trained to provide quality services, supported by Livingston County United Way.
## Appendix A - Global Results Framework Reporting Sheet
### Thriving Families

#### UWW Global Results Framework

<table>
<thead>
<tr>
<th>Mobilized Resources:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of volunteers supporting economic mobility.</td>
<td></td>
</tr>
<tr>
<td>Total dollar amount of resources invested in economic mobility (raised, leveraged and staff)</td>
<td></td>
</tr>
</tbody>
</table>

#### Change Systems-Systems Improvements:

<table>
<thead>
<tr>
<th>EMA</th>
<th>Number of policies promoted, enacted or modified to promote economic mobility.</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMB</td>
<td>Number of community partners organized, led and/or managed by United Way to promote economic mobility.</td>
</tr>
<tr>
<td>EMC</td>
<td>Number of financial sector staff trained to provide quality programs/services.</td>
</tr>
</tbody>
</table>

#### Direct Supports and Services:

<table>
<thead>
<tr>
<th>EM1</th>
<th>Number of individuals who receive job skills training.</th>
</tr>
</thead>
<tbody>
<tr>
<td>EM2</td>
<td>Number of individuals served who access affordable housing, financial products/services.</td>
</tr>
</tbody>
</table>

#### Change Lives-Client Outcomes:

<table>
<thead>
<tr>
<th>EM3</th>
<th>Percent of individuals who gain employment.</th>
</tr>
</thead>
<tbody>
<tr>
<td>EM4</td>
<td>Number of veterans served who gain employment.</td>
</tr>
<tr>
<td>EM5</td>
<td>Percent of individuals who increase their wages.</td>
</tr>
<tr>
<td>EM6</td>
<td>Percent of individuals served who increase their disposable income by accessing benefits and/or reducing their costs.</td>
</tr>
<tr>
<td>EM7</td>
<td>Total dollar amount of refunds returned to individuals/families through VITA and/or MYFreeTaxes.</td>
</tr>
<tr>
<td>EM8</td>
<td>Percent of individuals who earn job-relevant licenses, certificates and/or credentials.</td>
</tr>
</tbody>
</table>
### Appendix A-Global Results Framework Reporting Sheet
#### Successful Youth

<table>
<thead>
<tr>
<th>UWW GLOBAL RESULTS FRAMEWORK</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUCCESSFUL YOUTH</td>
</tr>
<tr>
<td>(Child and Youth, Birth through 18 Years)</td>
</tr>
</tbody>
</table>

#### Mobilized Resources:

- Total number of volunteers supporting childhood success
- Total dollar amount of resources invested in childhood success (raised, leveraged and staff)
- Total number of volunteers supporting youth success
- Total dollar amount of resources invested in youth success (raised, leveraged and staff)

#### Change Systems-Systems Improvements:

<table>
<thead>
<tr>
<th>CA</th>
<th>Number of policies promoted, enacted or modified to promote childhood success</th>
</tr>
</thead>
<tbody>
<tr>
<td>CB</td>
<td>Number of community partners organized, led and/or managed by United Way to promote childhood success.</td>
</tr>
<tr>
<td>CC</td>
<td>Number of early childhood staff trained to provide quality programs/services.</td>
</tr>
<tr>
<td>YA</td>
<td>Number of policies promoted, enacted or modified to promote youth success</td>
</tr>
<tr>
<td>YB</td>
<td>Number of community partners organized, led and/or managed by United Way to promote youth success.</td>
</tr>
<tr>
<td>YC</td>
<td>Number of youth development staff trained to provide quality programs/services.</td>
</tr>
</tbody>
</table>

#### Direct Supports and Services:

| CS1 | Number of children (0-5) enrolled in high-quality early childhood programs, supported by Livingston County United Way. |
Appendix A-Global Results Framework Reporting Sheet Successful Youth

CS2 _______ Number of children served receiving literacy supports in K-3, supported by Livingston County United Way.

CS3 _______ Number of families, caregivers served that are provided with information, resources, tools, training, or teaching skills, supported by Livingston County United Way.

YS1 _______ Number of school-aged youth who participate in school and/or community- based out-of-school time programs, or receive individualized supports, supported by Livingston County United Way.

YS2 _______ # of youth served who receive job skills training, supported by Livingston County United Way.

Change Lives-Client Outcomes:

CS4 _______ Number of children (0-5) served who achieve developmental outcomes.

CS5 _______ Number of children served who are proficient in school readiness assessment by the end of kindergarten.

CS6 _______ Number of children (K-3) served who are reading at grade level.

CS7 _______ Number of children (K-3) served who maintain satisfactory or improve school attendance.

YS3 _______ Number of youth served who graduate on time.

YS4 _______ Number of youth served who gain post-secondary employment, further education, or credentials.

YS5 _______ Number of youth served (ages 15-24) who gain employment.

YS6 _______ Number of middle/high school students served who earn passing grades in core subject areas.

YS7 _______ Number of youth who maintain satisfactory or improve school attendance.

YS8 _______ Number of middle/high school students who develop soft skills.

YS9 _______ Number of youth who transition from middle to high school on time.
### UWW GLOBAL RESULTS FRAMEWORK

**HEALTH & WELLNESS**

#### Mobilized Resources:

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total number of volunteers supporting access to health</td>
</tr>
<tr>
<td></td>
<td>Total dollar amount of resources invested in access to health (raised,</td>
</tr>
<tr>
<td></td>
<td>leveraged and staff)</td>
</tr>
</tbody>
</table>

#### Change Systems-Systems Improvements:

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AHA</td>
<td>Number of policies promoted, enacted or modified to promote health.</td>
</tr>
<tr>
<td>AHB</td>
<td>Number of community partners organized, led and/or managed by United Way</td>
</tr>
<tr>
<td></td>
<td>to promote health.</td>
</tr>
<tr>
<td>AHC</td>
<td>Number of health sector staff trained to provide quality programs/services.</td>
</tr>
</tbody>
</table>

#### Direct Supports and Services:

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AH1</td>
<td>Number of individuals served participating in physical activity and/or health</td>
</tr>
<tr>
<td></td>
<td>food access/nutrition programs.</td>
</tr>
<tr>
<td>AH2</td>
<td>Number of individuals served with access to healthcare services and supports.</td>
</tr>
<tr>
<td>AH3</td>
<td>Number of individuals served with access to healthcare insurance.</td>
</tr>
</tbody>
</table>

#### Change Lives-Client Outcomes:

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AH4</td>
<td>Percent of children/adults who eat healthier, increase their physical activity,</td>
</tr>
<tr>
<td></td>
<td>and/or move towards a healthy weight.</td>
</tr>
<tr>
<td>AH5</td>
<td>Percent of babies served who experience healthy birth outcomes (celebrate</td>
</tr>
<tr>
<td></td>
<td>their 1st birthday, carried to full term, born at a healthy weight).</td>
</tr>
<tr>
<td>AH6</td>
<td>Percentage of youth/adults served who avoid or reduce risky behaviors (alcohol,</td>
</tr>
<tr>
<td></td>
<td>drug abuse, unprotected sexual activity).</td>
</tr>
</tbody>
</table>
LIVINGSTON COUNTY UNITED WAY – COMMUNITY INVESTMENTS – GUIDING QUESTIONS – 2020

AGENCY: ___________________ PROGRAM: ___________________

REQUIREMENTS

NEED:
- Does the program clearly intend to address an identified community need?
- Is the local need well substantiated by research and statistics?
- Is the program adapting to meet the changing needs and challenges of its clients?

GOALS & OBJECTIVES:
- Are the goals and objectives clear, realistic, specific, and measurable?
- Are the goals and objectives aligned with the United Way Worldwide Global Results Framework?

FINANCIAL ACCOUNTABILITY:
- Does the financial information clearly account for how LCUW dollars will be used?
- Does the financial information clearly identify Livingston County’s activities and expenses?
- Does the level of funds requested seem reasonable to achieve the expected results?
- Does the program look to be sustainable over time?

STRATEGIES, METHODS & ACTIVITIES:
- Are the strategies well-designed?
- Are the models evidenced-based and proven to be effective?
- Does the program have an impressive track record of well-documented results?

EVALUATION:
- Will success be measured by tracking actual results to client and program goals?
- Will data be used to evaluate methods, processes, customer service, etc. and modify as needed to better serve clients?

QUALITY COMPONENTS

ALICE: Program significantly addresses the needs of ALICE (Asset Limited, Income-Constrained, Employed), 26% of working households struggle to afford the high cost of living in Livingston County, a symptom of the modern economy.

OUTWARD-FOCUSED: Program is proactive; focused on the customers and the community – seeking ways to be more effective and preventative; working with others to build better systems, addressing the root causes of problems, and sharing expertise to improve community conditions.

PREVENTION: Program focuses on key community resources, like education, youth development, early childhood services, nutrition, wellness, parenting support – services which provide a solid foundation for all residents and prevent problems from arising or escalating.

OTHER QUESTIONS:
Appendix C

Panel Presentation Guidelines

Guidelines for Program Presentations

- Plan your presentation for 45 minutes in total, including 10-15 minutes for questions.
- All presentations will be held in the LCUW Conference Room.
- A panel of 10-15 community volunteers will review scheduled presentations; discuss merits of each program later in the day; and reach a consensus decision regarding recommended funding.
- Panelists come fully-prepared, having reviewed your applications prior to the presentation date.
- A waiting room is available across the hall from the presentation room.
- Individuals are invited to observe other scheduled presentations, as part of a non-participatory audience, but will be asked to leave the room between presentations, so that panel volunteers are free to start discussions. The chairs positioned against the walls are available to you.
- Present local data as evidence of the local need.
Appendix C

Panel Presentation Guidelines-continued

Content for Program Presentations

Plan and deliver your presentation as though no one knows what you do.

- **This is who we are.**
  
  Introduction

- **This is what we do.**
  
  Brief History, mission, scope of programs.

- **This is why we are requesting funds.**
  
  Statement of Need. What is the problem this project or program intends to address, target population, geographical area, a few supportive facts.

- **This is how we will use the funds.**
  
  Methodology. Describe what you plan to do to address the problem.

- **This is how we know that the program is working and making a difference.**
  
  Expected outcomes, metrics for measuring success.

- **This is how our program impacts ALICE and/or supports prevention.**

- **This is how our program addresses the impact area of THRIVING FAMILIES, SUCCESSFUL, YOUTH and/or HEALTH & WELLNESS.**
Appendix C

Panel Presentation Guidelines-continued

Visuals and Delivery for Program Presentations

Visuals can help you get your message across. Creative visuals can even entertain and make your presentation more memorable.

- Please do not bring handouts or brochures. Do not pass around items before or during the presentation.
- You are free to use handheld visuals, poster board on an easel, and creative props.
- **White Board**: The presentation room includes a 17’ wide, floor-to-ceiling wall of white board, which could be used to display prepared facts or information on large poster size flip chart paper, with the sticky area on the back. **No tape**.
- **PowerPoint Presentations**:

  No more than 5-8 slides that address one or more of the following:

  - Major accomplishments so far this year
  - Measured results and outcomes from last reporting period
  - Trend statistics on your cost per unit of service, % of target population served, and/or progress toward your long-term goals

  **Utilize a large font** and keep slides clean, simple and uncluttered.

  - Do not just read slides verbatim-props versus a teleprompter.
  - Have a back-up plan in case of technological failure.
  - Email presentation slides to lwelch@lcunitedway.org by 9 am on Monday, April 20th. We will have projector set up and our laptop loaded with your presentations.