United Way of
Allegheny County | **United Way**

United Way of Allegheny County
Vulnerable Seniors & Adults with Disabilities

2009 On-Line Proposal Instructions

e-CIMPACT User's Manual

All Funding Applications
Must Be Submitted On-Line
By 5:00 PM on Monday, August 3, 2009

C:\Users\christian.cockroft\AppData\Local\Microsoft\Windows\Temporary Internet
Files\Content.Outlook\RA7VUFUO\UWAC e-CImpact User's Guide.doc

United Way of Allegheny County
e-Cimpact Site User's Manual

Introduction

This User's Manual is intended to provide guidance as you complete the online submission of your United Way proposal. The following pages contain examples of the various screens that you will view as you work on the United Way of Allegheny County's On-line Agency Site. The examples presented here are intended to provide a general introduction to the main sections of the agency forms, along with examples of the navigational features available.

United Way is reflecting a national and local trend by offering online submission of your proposal as well as subsequent grant reporting. This system will allow United Way to be more efficient as it collects information and analyzes the impact of its funding for reporting to donors and the community.

E-CImpact is a web-based system so you can enter and update information at any time until you submit the proposal. This system also allows several users at your agency to enter and edit the proposal information. Note that the screens are examples—and once you enter your own information the screens will reflect your own information. Each agency will have its own website, which is seen as your Home Page when you log-on.

Also note that the sample screens in this manual, may include references to 2008-2009 Seniors RFP—we have updated that and on the website the references will be to the 2009 Seniors and Adults with Disabilities. IN any case, there is only one Seniors and Adults with Disabilities RFP on the site.

We suggest that you consult the online checklist before you begin and use it as a guide through the process.

Please keep in mind that e-CIMPACT is a new online software application for the United Way community impact fund processes. Your patience and input is greatly appreciated.

Please communicate any and all feedback regarding this new e-CIMPACT application to
Mary Phan-Gruber at 412-456-6866 or mary.phan-gruber@uwac.org
or
Tracey Reed Armant at 412-456-6782 or tracey.armant@uwac.org

Online Submission Deadline: August 3, 2009, 5:00 p.m.

RFP Timeline – Vulnerable Seniors & Adults with Disabilities - 2009	
July & August	Recruitment of RFP Review Team Members – Position Description & Timeline Sent to Current Volunteers, ECM's, & AAA Management
July 1	**RFP Materials Posted On United Way Website**--Notice Sent to Post-Gazette & Tribune Review; Emails Sent to Partner Agencies, Agencies on List of Those Interested and HelpConnections Agencies
July 8, 1:30-4:30 **July 10, 8:30 – 11:30** August 3 August 3 - 6	Training for Applicants - RFP Background, Process, Proposal Form, Logic Model, OET **United Way Offices-Strip District** **Eat-n-Park Training Center-Homestead** Step 1 Applicants Submit Forms by 5 P.M. **– Proposal Summary, OET, Logic Model and Supporting Documentation** UW Staff Review - Proposal Summaries
August 21 **Sept 1** Sept 2-4 Sept 8 Sept 14, 16	**Selection Committee Meeting**– Propose 8-10 Proposals for Step 2 Impact Cabinet Meeting – Review Selection Committee Recommendations Executive Committee Review of Impact Cabinet Recommendations via Email **Invite 8-10 Providers to Submit Step 2 Proposals** – Staff Invites Agencies and Notifies Partner Agencies That Are Not Invited Via Phone Calls Step 2 Training for Agencies – Evaluation Plans & Data Gathering
Sept 15, 17 **Sept 28** Sept 28, 29, 30 Sept 30 **Oct 6 – 9** Oct 14 Oct 14-16	Training for RFP Volunteer Review Team Volunteers **Step 2 Applicants Submit Full Proposals By 5 P.M.** – Full Proposal Form With Evaluation Plan, Financials, Capacity Self Assessment Tool UW Staff Review - Proposals/Financials Volunteer Reviewers Receive, Read and Score Full Proposals **Volunteer Review Team Meetings –** Consensus Scores & Comments **Selection Committee Meeting** – Recommend 5-7 Agencies for Site Visits Impact Cabinet/Executive Committee Review of Recommendations via Email

Oct 16	UW Staff Notify Site Visits Invitees – Schedule Site Visits & make phone calls to Partner Agencies that are not invited
Oct 21- 26	**Step 3 Site Visits to Invited Agencies**
Oct 28	**Final Selection Committee Meeting** – Funding Recommendations (~4)
Nov 3	Impact Cabinet Meeting – Review Funding Recommendations for Exec Committee Approval
Nov 17	Executive Committee Meeting and Approval for Board
Dec 8	Board Meeting

OnLine Checklist—Completing the Proposal

1. Review the Login Instructions and your initial user name/password
2. Login and create and record a new password
3. On Home Page, see Resource Center on left Box for rfp and training materials
4. On Home Page, update your Agency Profile (left bar)
5. Add other staff who will be online into Contacts (left bar on Home Page)
6. On Home Page, click the Assign Program to this Investment
7. Add your agency Program(s) (project or departments) for this proposal
8. When you receive UW email confirmation--open Application Overview Packet
9. In Agency packet, complete the Agency Cover Sheet
10. In Agency packet, compete the Budget information
11. In Agency packet, complete the OET (organization eligibility tool)
12. In Agency packet, attach your IRS determination letter (501 (C) (3))
13. In Program packet, complete the Program Summary (questions and narrative)
14. In Program packet, complete the Logic Model Template
15. Review all materials for completion and insure they are in Verify mode
16. Submit application and watch for email verification

Login Instructions

To access the online funding application, go to www.unitedwaypittsburgh.org
Select "Featured News" and click on Vulnerable Seniors and Adults with Disabilities link.

Or you may type http://agency.e-cimpact.com/login.aspx?org=40445F
in the address field at the top of your browser. Bookmark or add to favorites.

Password: All users with access to the on-line application will be assigned a *temporary password*. Once you have filled in the required login information, click on Sign in to our Secure Server to enter the application. The system will automatically ask you to change your password. Due to obvious security reasons we have implemented username and password requirements.
- Usernames must be at least 3 characters (alpha or numeric)
- Passwords must be between 6 and 15 characters in length and they must contain at least 1 character from two of the following groups, alpha, numeric or special character. Quotes, commas, percent signs and spaces are not allowed.

Online RFP Application Instructions
United Way of Allegheny County—RFP for Seniors and Adults with Disabilities
e-CImpact System Starting Instructions

1. **Sign up for agency training by contacting communityimpact@uwac.org and providing this basic information:**
   - Your agency name and address
   - Executive Director/CEO first/last name, email and phone information. Note that the Executive Director/CEO information is used as the first way to access the system—you will be able to then add any agency staff who will actually complete or review the RFP.
   - We will then add this basic information into the online RFP system and you will then have access through a temporary user name and password to your own agency website in the system.

2. **We will email the temporary user name and password information to the Executive Director/CEO, but if you prefer, a responsible contact person from the organization can contact communityimpact@uwac.org to also receive that information**. We will then email your temporary user name and password and the website URL. Note that upon the first entry to the system, the user will be required to change and create their own password. United Way does not have access to your password—please keep track of it.

3. Each agency can authorize additional users to have access to your agency's online site through a contact section on the agency's home page. See the Contacts section of the e-CImpacts User's Manual for additional guidance. **This manual is available on-line.**

To Log-in

1. **https://agency.e-cimpact.com/login.aspx?org=40445F**
2. **Enter Username:**
3. **Enter Password:**

Login Page

When you reach the website at **https://agency.e-cimpact.com/login.aspx?org=40445F**, the Login Page shown below will appear. This website is confidential and therefore requires a username and password. United Way will provide an initial username & password. After it is used, the user will be prompted to create their own username and password. All users with access to the on-line application will be assigned a username.

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Agency Home Page

Once users have logged in to the application, the first screen that appears is the Home Page for your agency. Note on the left sidebar, the link to the Seniors and Adults with Disabilities RFP and below that a Resource Center that includes additional RFP and Training materials. However your next step is to complete your agency profile before proceeding to the proposal.

ABC Test Agency

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Agency Profile

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United Way

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(1)2009 Senior & Adults w/Disabilities (Step 1)

Helping Youth and Young Adults Succeed

(1) 2008-09 Youth and Children RFP (Step 1)

(2) 2008-09 Youth and Children RFP (Step 2)

2008-09 Mid-Year Reporting

Resource Center

Youth Training & Resource Materials (3)

Seniors/Adults w/ DisabilitiesTraining Materials (5)

Reports

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Seniors/Adults w/ DisabilitiesTraining Materials > Resource Center

Resource Center
RFP Background Background has need statement, agency eligibility, timeline, proposal process, scoring criteria, outcome: and proposal summary questions. - 7/6/2009
FAQs Frequently-asked questions - 7/6/2009
Outcomes/Indicators List List of outcomes and standard indicators - 7/6/2009
Timeline--RFP Process Timeline rfp process - 7/6/2009
Log-In Instructions log-in instructions for agencies - 7/6/2009

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<u>Helpful Hints</u>

- Always click SAVE as DRAFT before leaving a page.
- Do download Google Tool Bar. It makes spell checking so much easier.
- Allow Pop-ups while on this site. Some of the items are pop-ups.
- If you only have paper copies of audits, 990's or financial statements.

> First ask firm doing the work if they can send you a copy via disk or email.
> This should be NO PROBLEM and FREE.
>
> If it is a problem, take your paper copy and have it scanned. If scanning software is not available in your office, this can usually be done cheaply at places like Staples or Office Depot. Scan and save to disk or to hard drive for uploading as attachment.

- Two agency users can be on the agency site at one time, however the important thing to know and remember is that they could potentially write over each other's work. If for example, they both had a budget open at the same time whoever saves LAST will write over what the other one has entered.

- On the left side of the screen, is a list of options referred to as the **Navigation Menu (Left Sidebar)**. This menu is the main navigational tool of the site. By clicking on the commands listed here, the user will be able to quickly access the various sections of the proposal. Note that <u>manipulating the navigation menu will **NOT** save your data.</u> Use save/update or save/return to previous page buttons for this purpose.

- e-CIMPACT contains a character count function in each text box. It will tell you how many characters have been used. It does not contain a spell checker.   UWAC recommends downloading the Google tool bar. It is free and includes a spell checker that will check spelling any web page. (*toolbar.google.com)*

<u>Copying and Pasting From Word Documents</u>

When filling out a form users are able to cut and paste out of a word document directly into the narrative text field on an e-CIMPACT form. If the key board short cuts (paste= Ctrl V, cut = Ctrl C) are used when using cut and paste then the text box will provide a word count. If the key board short cuts are not used then the word count will be available when the user hits enter or the form is saved or the text box has been typed in.

<u>Printing Form and Proposals</u>

An agency has the option to export the entire application packet to PDF when a link to Export Form or Proposal appears on the bottom right of the Form or Packet page. United Way highly recommends using the Large Font version of this export function. The application packet can be in initial, draft, or completed status to utilize this export function. Each page can also be exported separately using this function on corresponding pages. <u>Please note that Adobe Acrobat 6.0 or higher must be installed in order to utilize this function.</u>

<u>Form or Packet Status</u>: Each form and application section will show one of the following as its status.

<u>Initial</u>– At the beginning of each cycle, all active forms will show a status of "Initial," meaning the application is ready for modification.

<u>Draft</u> – Once a modification or entry has been made in the application and saved, the project status will change to "Draft." This status will remain until the application is verified ,

<u>Verified</u> – Once all information has been input, complete each application section by selecting the *Save and Verify* function at the bottom of each section. If any item is highlighted in red, it means that a required field is missing or that logic does not sync; this must be corrected in order to complete the proposal.

Agency Profile

Your first task on the home page is to update your agency profile, including agency addresses and program locations, individual contacts, and general information regarding the agency's mission, description, website, etc.

UNITED WAY OF ALLEGHENY COUNTY | PENN LIBERTY PLAZA ONE | 1250 PENN AVENUE | PO BOX 735 | PITTSBURGH, PA 15230-0

ABC Test Agency

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Helping Youth and Young Adults Succeed

(1) 2008-09 Youth and Children RFP (Step 1)

(2) 2008-09 Youth and Children RFP (Step 2)

2008-09 Mid-Year Reporting

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Youth Training & Resource Materials (3)

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Agency Profile

Agency Name:*   ABC Test Agency

Accreditation By: [ ]

Website: [www.google.com]

Staff Liaison: [Tracey Reed-Armant ▼]

Primary Contact: tim wo

Description:
```
ABC Test Agency Description
```
Limit up to 750 characters

(* Required field)

💾 Save/Update

Account Names

Type	Account Name	Actions
➕ Add New Account Name		View All Account Names 🔎

Addresses

Type	Address	Primary?	Actions
Main	Any Street, Pittsburgh, PA 15222, U.S.A.	Yes	Edit Delete 🔎
➕ Add New Address			View All Addresses 🔎

Phone Numbers

Type	Phone Number	Primary?	Actions
Main	(412) 555-1212	Yes	Edit Delete 🔎
➕ Add New Phone Number			View All Phone Numbers 🔎

Email Addresses

Type	Email Address	Primary?	Actions
Secondary	abs@wyz.com	No	Edit Delete
Main	arind@uwac.org	Yes	Edit Delete
Home	jlm@mnop.com	No	Edit Delete
➕ Add New Email Address			View All Email Addresses 🔎

Contacts

The Agency Contacts page requests information about key agency contacts and identification of one main contact using a radio button. Required contacts include the Executive Director or CEO as that is the individual whose electronic signature is required for final proposal submission. For agencies who pre-register for training, United Way has already entered the Executive Director/CEO contact information into the system. You are not required to request log in permission for these individuals but you must enter them as a contact.

Other users must be included as contacts and they must be given log in permissions.

To add a new contact, click on the *Add New Contact* button below the table. Utilize the *Edit* and *Delete* commands to make necessary changes to existing contacts.

Agencies are able to request a Login for their own staff from the Agency Site. When an agency requests a new Login, an automated email is sent to the Agency's Primary Email Address alerting them of a New Agency Login request to be approved. The administrative user is able to easily Approve New Login Requests via Login Management. The system was established using the agency CEO as the Primary email account.

The following screen provides an example of an *Add New Contact* screen.

Using the Drop down Menu Features (Screen Below)

The **drop-down menu** allows the user to select the appropriate contact type. To select a contact type, click on the arrow on the right side of the contact field and select the most appropriate description for the contact you are entering or editing. Also enter the individual's exact title in the *Job Title* field, as well as the contact's place of employment, particularly for board members who are not employed by the agency.

Further down the page, there are three additional edit options: *Add New Address*, *Add New Phone Number*, and *Add New Email*. All contacts must have an associated address, phone number and email address. Note that to add a new contact, only general information is requested.

You may enter the contact address, phone number and email address now or utilize the *Edit* function once the new contact is saved in the system to provide an address, phone number and email address for that individual.

Contacts Continued Once you select Add New Contact, the following page provides fields for you to enter the contact information.

Adding Addresses

To add additional addresses, click on *Add New Address.* Make sure and add your mailing address if it is different than the location address.

The phone number will be the main agency phone number. You might want to add cell phone for the CEO.

Saving Information

On every screen where there is information that can be updated, there is the ability to save the information that is being updated. By scrolling to the bottom of the page, *the Save Update* section will be visible. Click on the text direction or the icon to the left of the text to activate the function. Select *Save/Update* which will save the information and show the same screen just updated. If you choose *Save and Return to Previous Page,* the system will save the information and take you back to the previous screen. *Cancel and Return to Previous Page* to return to the previous screen without saving any changes.

Add and Assign Program

From the Navigation Menu, enter the Assign Program to Investment Process. Click on Add New Program. On the next screen, seen below, you will provide the title and description of your Agency Program, Project or Department which is relevant to this proposal. Click on the box below for United Way—this will send an email to United Way to create an internal link for your proposal. When you receive a return email from United Way—you will be able to proceed into the RFP link to complete the proposal.

Additional programs can be added at any point by clicking the Programs link on the left navigation menu and linking it to the RFP.

Signed in as: **Andy S. Rind**   Change Password | Edit Profile | Signout

TIMES LIKE THESE ARE WHY WE'RE HERE   United Way

UNITED WAY OF ALLEGHENY COUNTY | PENN LIBERTY PLAZA ONE | 1250 PENN AVENUE | PO BOX 735 | PITTSBURGH, PA

ABC Test Agency

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United Way

Assisting Vulnerable Seniors and Adults with Dis

(1)2009 Senior & Adults w/Disabilities (Step 1)

Helping Youth and Young Adults Succeed

(1) 2008-09 Youth and Children RFP (Step 1)

(2) 2008-09 Youth and Children RFP (Step 2)

2008-09 Mid-Year Reporting

Resource Center

Youth Training & Resource Materials (3)

Reports

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Please complete the information below to indicate which program of your agency you are submitting for this rfp proce and click on the save button, you will receive a confirmation email to confirm the submission of this request. Once you the UW administrator, you will receive a second email advising you that your program has been accepted and you car the rfp.

Program Name:*   Helping Seniors Stay At Home

Description:
Program of staff and volunteers who provide variety of services based on client needs to help seniors remain in their own homes rather than being institutionalized.

Limit up to 1500 characters

Assisting Vulnerable Seniors and Adults with Disab

☐ United Way - Assisting Vulnerable Seniors and Adults with Dis - (1)2009 Senior & Adults w/Disabiliti

💾 Save

↩ Cancel and Return to Previous Page

RFP Application Overview Packet

After completing the *Agency and Program Profiles* sections, the next step is to begin the proposal. Click on the link to 2009 Seniors and Adults with Disabilities located on the left Navigation Menu. You will then see the two packet sections of the proposal, the Agency Packet (contains the agency cover sheet, budget sheet, OET and submission of IRS determination letter) and the Program Packet (contains the Proposal Summary and the Logic Model).

Note that in this sample, a user has already entered some information in the program packet (Draft Status) but no information has yet been entered in the Agency Packet (Initial Status). By clicking on the link under the **Actions on**, you will access the forms that are part of that packet. Note that you will want to continue to press **Save/Update** on the link below as you make changes on each page. When the proposal is ready for submission, and the Status for all sections read "Verify", you will return to this page to **Submit** the proposal application (at which time it will be highlighted).

Agency Packet Summary

The "Agency" packet section represents the agency-related sections of the proposal. Click on the edit button for each of the three forms to complete each one. You are also required to attach a copy of your 501 (c) (3) IRS Determination Letter on this page. If you have this scanned or saved on your own computer, it can be accessed through the Browse button next to it.

Agency Packet ---Agency Cover Sheet

The agency cover sheet can include information that was entered in the Agency Profile. Note that items which are not in text, such as Administrative Overhead are automatically calculated once the information is entered in the text boxes and the page is Saved.

ABC Test Agency
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  (1) 2008-09 Youth and Children RFP (Step 1)
  (2) 2008-09 Youth and Children RFP (Step 2)
  2008-09 Mid-Year Reporting

Resource Center
Youth Training & Resource Materials (3)

Reports
Download Adobe Reader

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(1)2008-09 Senior & Adults w/Disabilities (Step 1) > Forms

Status: Draft

Step 1a: Agency Cover Sheet:
Helping Vulnerable Seniors and Adults with Disabiliteis Stay Safe at Home

Contact Information

Agency Name (lead agency): `ABC Test Agency`
Limit up to 150 characters (15 used).

Address: `Any Street, Pittsburgh, Pennsylvania, 15222, U.S.A.`

Website: `www.google.com`

Executive Director: `Barbara A. Lewis`

Email: `arind@uwac.org`

Phone Number: `(412) 555-1212`

Current Annual

Agency Budget (lead agency if part of a collaborative):

Number of Full Time Employees:

Number of Part Time Employees: `0.00`

From most recent 990

A: Line 12 - Total Revenue

B: Line 14 - Management and General

C: Line 15 - Fundraising

Administrative Overhead %   0.00

Provide your mission statement, a BRIEF description of your organization's history and an outline of your agency's core program services.

`basket weaving expansion around the world`

Limit up to 2000 characters (41 used).

[💾] Save as Draft   Export This Form To _

[💾] Save As Draft And Return   Export This Form To Adobe PDF (I

[💾] Save and Verify

[↩] Cancel And Return To Previous Page

Agency Packet –Budget Summary

Complete the surplus, deficit and total agency expense for the current and past two years as noted below. Be sure to save when completed

Agency Packet –Organizational Eligibility Tool (OET)

In order to quality for impact funding, agencies must qualify on this tool and have all items completed as a "yes". Follow the instructions and note that any items marked "no" allow an explanation to be included in the text box below**. (See Page Below) Disregard Item 4 in the instructions.**

It may be helpful to print a copy of the OET before you begin to complete it. Scroll to the bottom of the form and use the Export to Adobe PDF (large font) for a print copy.

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United Way

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(1)2008-09 Senior & Adults w/Disabilities (Step 1) > Forms

Status: Draft

Step 1c: Organizational Eligibility Tool (OET)
NOTE: United Way of Allegheny County (UW) Impact Fund Eligibility Requirements
In order to be considered eligible for funds from the UW Impact Fund, all items on this form must be answered with a "Yes".

1. Please read the entire question before marking your answer.

2. Check the appropriate button: Yes / No

3. If you reply No to any item but would like to clarify your response please explain by using the TEXT BOX provided.

4. All responses requiring further clarification are subject to staff follow-up for additional documentation.
<u>Frequently Asked Questions from Charitable Organizations</u>

I. Legal and Ethical Considerations

We operate under board-approved bylaws.
○ Yes
○ No

If no, please explain.

Limit up to 3500 characters (0 used).

We operate under a current 501(C) 3.
○ Yes
○ No

If no, please explain.

Limit up to 3500 characters (0 used).

We have Directors & Officers Errors & Omissions Insurance.
○ Yes
○ No

If no, please explain.

Limit up to 3500 characters (0 used).

We comply with our state's Solicitations Act.
○ Yes
○ No

If no, please explain.

Limit up to 3500 characters (0 used).

We comply with the provisions of the U.S.A. Patriot Act.
○ Yes
○ No

If no, please explain.

Limit up to 3500 characters (0 used).

Our licensing is current, as required.
○ Yes
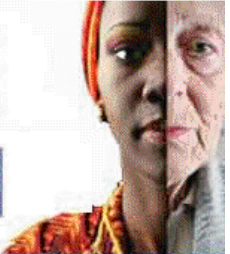○ No

If no, please explain.

Limit up to 3500 characters (0 used).

Program Packet Summary

The program packet summary contains two documents to be completed for the proposal; the Proposal Summary and the Logic Model. Access these documents through the Edit function next to the Program Information.

-

Program Packet: Proposal Summary (see 3 pages below)

This form includes the narrative questions as well as the collaborating agencies, service information and amount of the request. Note that you must save for calculated fields (i.e. average cost per participant) to appear. All forms must be verified before the application is ready to submit to UWAC.

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(1)2009 Senior & Adults w/Disabilities (Step 1) > ABC Test Program > Forms

Status: Initial

Step 1a: Proposal Summary

Agencies will receive an email confirmation of their Step 1 proposal upon completion of all the required forms and attachments. Please be sure to save and verify each form when complete. If you have additional questions email communityimpact@uwac.org or please call Barb Lewis at 412.456.6781

Cover Sheet: Assisting Vulnerable Seniors and Adults with Disabilities

Program Name

ABC Test Program

Limit up to 150 characters (16 used).

Primary Proposal Contact Name:

Andy S. Rind

Email:

Phone Number:

Collaborating Agencies
Contact Information
(If a collaborative of agencies is applying to share the funding, list the other collaborating agencies below)

Collaborating Agency Name 1:

Limit up to 150 characters (0 used).

Address:

Limit up to 150 characters (0 used).

Website:

Limit up to 150 characters (0 used).

Collaborating Agency Name 2:

Limit up to 150 characters (0 used).

Address:

Limit up to 150 characters (0 used).

Website:

Limit up to 150 characters (0 used).

Collaborating Agency Name 3:

Limit up to 150 characters (0 used).

Address

Limit up to 150 characters (0 used).

Website

Limit up to 150 characters (0 used).

Proposed Service Information

Total Cost of Service*

Expected Number of Participants:*

0.00

Average Cost per Participant

0.00

Proposal

Dollar Amount of this Funding
Request:

? Percent Request to Program
Budget:

0.00

Indicate if funding will support:

If the request represents an
expansion, indicate additional # of
individuals expected to be served.

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Program Packet: Proposal Summary – Continued

Text can be copied and pasted from a Word Document. Note that each text box has a limited number of characters as noted in each question—as you hit the enter key and save you will see the number of characters. Be sure that you **do not** exceed the limit. You may want to print this form (see bottom of the form) before completing to insure you see all the questions before you begin. (See Helpful Hints section on copying and pasting).

Section 1: Questions 1 - 8

1. a. Purpose Statement: In one or two sentences, provide a brief statement of the project goal which notes the target population, geographic area to be served and outcome to be achieved.

Limit up to 1500 characters (0 used).

b. (Optional--answer this question only if this is a collaborative request of several agencies). For each collaborative member other than the lead agency, provide the agency's mission, a brief description of its history, and an outline of its core program services. (The mission, history and program services of the lead applicant agency were collected in the earlier "agency cover sheet").

Limit up to 4000 characters (0 used).

2. Describe the critical community need (aligned with the UW outcomes) that your program is designed to address and the specific population to be served by your program. Also describe the agency's effectiveness in serving this population, including the strategies used to attract, select and retain participants and address particular barriers to their participation.

Limit up to 2500 characters (0 used).

3. List the geographic area or neighborhoods to be served and indicate whether the agency and/or program currently serves those areas. If relevant, briefly provide supporting data which indicates particular great needs of the target population in that area.

Limit up to 2500 characters (0 used).

4. Describe the proposed program or project and how it achieves United Way's preferred outcomes. Also describe how this effort is coupled with other public or private efforts to help achieve community impact.

Limit up to 3500 characters (0 used).

Program Packet: Proposal Summary - Continued

5. Indicate how the requested United Way funds will be used to support, expand and/or enhance existing services. If this is a new service, explain why this program is needed and how funds will be used.

Limit up to 3000 characters (0 used).

6. Describe how this program coordinates with other programs and agencies. If this is a formal collaboration, describe coordination of services and define each agency's role, and any respective share of the funding request.

Limit up to 3500 characters (0 used).

7. Explain how reliable data will be used to provide evidence of the program's effectiveness for participants. Describe the unique value of this program.

Limit up to 2500 characters (0 used).

8. Why is this program the best investment of community-generated United Way dollars? Explain how this program is effective in preventing serious problems for individuals and the community at large.

Limit up to 3000 characters (0 used).

Save as Draft

Save As Draft And Return

Save and Verify

Cancel And Return To Previous Page

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Program Packet: Logic Model Template Instructions

The Logic Model Template is designed to be completed by beginning with the Preferred Long-Term Outcomes and Indicators and moving through the other sections: Supporting Long-Term Outcomes, Intermediate Outcomes, Initial Outcomes, Activities, Input-Constraints and Input-Resources. You will note a **View Diagram** link on each page of the Logic Model forms, which can be accessed at any time and provide a visual of your template at any point. You can also print out the text version of your Logic Model at any point by accessing the **Export Form to Adobe PDF** on the bottom right of each page.

Note that for this RFP, United Way has standard Preferred Long-Term and Supporting Long-Term Outcomes which will need to be selected by all Providers. You cannot add other Long-Term Outcomes in either of those categories.

The Preferred Long-Term and Supporting Long-Term Outcomes and all other sections noted above can be accessed by clicking on the right arrow in the **Create New Section Box** on the Logic Model Template page and selecting the relevant selection in the Drop down Box. Then click on the plus sign next to the box to go to a page where you can add your information for that section of the Template. After you Save (by either clicking small logo on left above the View Diagram in the right corner or the Save and Return to Previous Page at bottom of the page)--you will then see that section added to the Logic Model template page.

For each of the Long-Term Outcomes, United Way has provided Indicators which can be selected for this process--or the agency can add its own Indicators (by clicking on Add additional indicators in the "Add New" area on the right for each section). See the list of Outcomes and Indicators in the Resources Section of your agency Home Page.

Note that you may want to change the Order of the various items in each section so that they line up in your diagram. This can be done by clicking on the Order arrows on the left section of the Template form.

We suggest you begin by selecting a Preferred Long-Term Outcome and Supporting Long-Term Outcome, and checking the related indicators you would use (and adding your own). Then proceed to complete all the sections of the Logic Model related to that Outcome (for example, Intermediate Outcomes, Short-term Outcomes, Outputs, Activities and Inputs (resources and constraints). Then if it is appropriate to add additional Outcomes, return to the Create New Section and begin again to select an outcome, indicators and add the other sections.

You may want to review all of the following sample Logic Model pages to see how your model will build on the page as you add the various components of the Logic Model.

NOTE: Actual Projections (i.e., target # of seniors to be served) will be requested in the next stage (Step 2) of the Proposal process for this RFP for agencies selected to continue.

Program Packet: Logic Model Template Continued

ABC Test Agency > (1)2008-09 Senior & Adults w/Disabilities (Step 1) > ABC Test Program > Forms

Form Status: Initial

Step 1b: Logic Model Template

<u>View Diagr.</u>
Link opens in new windo

Applicants must complete this template in relation to at least one of the United Way's Preferred Outcomes.

Indicators – select which indicators you will use to measure success toward the Preferred or Supporting Outcome by checking the corresponding box next to the indicator. In order to add the projected numbers to be tracked a achieve the indicator hit the measurement link and complete the number fields.

Note: Agencies will be evaluated on the proposed collection and reporting of indicators that are relevant to the preferred and supporting outcomes.

Create New Section: [Supporting Long-term Outcome ▼]

Order	Preferred Long-term Outcome	Add New
⬆️⬇️	Preferred: Caregivers Support Description: Preferred: Caregivers Support After saving, click on the 'Add'l Ind' link to add in your indicators.	**Edit:** <u>Description</u> Delet <u>Add'l Ind</u> (Initial)

💾 Save and Return to Previous Page   Export This Form To Adobe P

💾 Save and Verify   Export This Form To Adobe PDF (Large For

🔙 Back to Packet Overview

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rce Center
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Program Packet: Logic Model Template Continued

Step 1b: Logic Model Template

Add New Preferred Long-term Outcome

What changes do you expect for your participants over time? (State or condition)

Impact Area:	2. Assisting Vulnerable Seniors & Adults with Disa
Outcome Statement:	Preferred: Caregivers Support
Description:*	Caregiving Support: Increase the number of caregivers able to keep their family member at home

Limit up to 500 characters (94 used).

Indicators

☐ # of caregivers who obtain community resources

☐ # of caregivers who report they maintained loved one in home for 6 to 12 months due to the avail of support services

☐ # who are trained and implement appropriate caregving skills

Save/Update

Save and Return to Previous Page

Cancel and Return to Previous Page

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 (1) 2008-09 Youth and Children RFP (Step 1)
 (2) 2008-09 Youth and Children RFP (Step 2)
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Program Packet: Logic Model Template Continued

On the right side, next to each of the Outcomes, under Add New, you will see a link for the Description of the Outcome. Underneath is a link to add Additional Indicators for any of the Preferred and Supporting Outcomes. The new Indicator can be entered in the text box as seen below.

Program Packet: Logic Model Template Continued

ABC Test Agency > (1)2008-09 Senior & Adults w/Disabilities (Step 1) > ABC Test Program
> Forms

Form Status: Draft

Step 1b: Logic Model Template

View Diagram
Link opens in new window.

Applicants must complete this template in relation to at least one of the United Way's Preferred Outcomes.

Indicators – select which indicators you will use to measure success toward the Preferred or Supporting Outcomes by checking the corresponding box next to the indicator. In order to add the projected numbers to be tracked and achieve the indicator hit the measurement link and complete the number fields.

Note: Agencies will be evaluated on the proposed collection and reporting of indicators that are relevant to the preferred and supporting outcomes.

Create New Section: Initial Outcome ▾ +

Order	Preferred Long-term Outcome	Add New	
⬆⬇	Remain safely in home or community setting Description: Preferred Outcome: Increase the no. of frail and vulnerable seniors or adults with disabilities who remain safely in their homes or in a least restrictive community-based setting.	**Edit:** Description Add'l Ind (Initial)	Delete
	⬆⬇ Indicator: # of clients who maintain non-institutional status		Delete
	⬆⬇ Indicator: # who relocated to nursing homes (long-term care facilities)		Delete
⬆⬇	Preferred: Caregivers Support Description: Preferred: Caregivers Support After saving, click on the 'Add'l Ind' link to add in your indicators.	**Edit:** Description Add'l Ind (Verified)	Delete

Order	Supporting Long-term Outcome	Add New	
⬆⬇	Supporting: Functional, health, nutritional status Description: Supporting Outcome: Increase the no. of frail seniors and adults with disabilities that have adequate/improved nutritional, health and/or functional status.	**Edit:** Description Add'l Ind (Verified)	Delete
	⬆⬇ Indicator: # who complete an assessment of physical/mental health status		Delete

Order	Intermediate Outcome	Add New	
⬆⬇	clients show actively particpate in health and wellness programming	**Edit:** Description	Delete
	⬆⬇ Indicator: 70% particpation in 6 month waling program		Delete

Save and Return to Previous Page

Save and Verify

Back to Packet Overview

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Program Packet: Logic Model Template Continued

Select Activities and click on the blue button with the plus sign in the middle. This will take you to the page where you enter activities. Select the next item which is short term outcomes and click the blue button. This will take you to the page where you enter activities. Follow the same steps for intermediate and long term.

Program Packet: Logic Model Template Continued

WHY WE'RE HERE

UNITED WAY OF ALLEGHENY COUNTY | PENN LIBERTY PLAZA ONE | 1250 PENN AVENUE | PO BOX 735 | PITTSBURGH, PA 15230-0

ABC Test Agency

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United Way
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Helping Youth and Young Adults Succeed
  (1) 2008-09 Youth and Children RFP (Step 1)
  (2) 2008-09 Youth and Children RFP (Step 2)
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ABC Test Agency > (1)2008-09 Senior & Adults w/Disabilities (Step 1) > ABC Test
Program > Forms

Step 1b: Logic Model Template

Add New Activity

Enter up to five (5), then press 'Save and Return to Previous Page'.

What happens in the proposed program?

1) Activity:

> Implement schedule of seniors in-home visitations.

Limit up to 500 characters (50 used).

2) Activity:

> Meet weekly with full team to review cases.

Limit up to 500 characters (43 used).

3) Activity:

Limit up to 500 characters (0 used).

4) Activity:

Limit up to 500 characters (0 used).

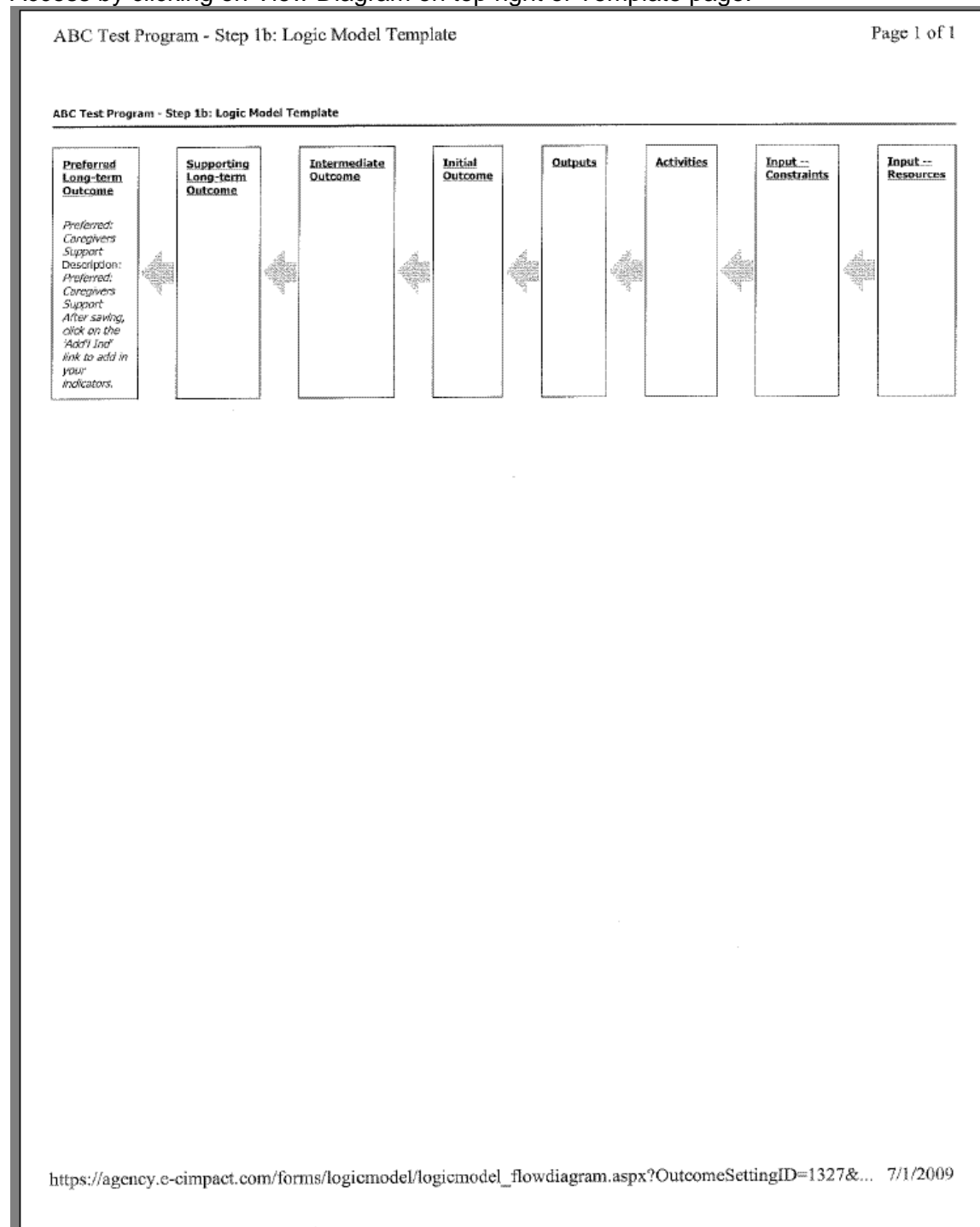5) Activity:

Limit up to 500 characters (0 used).

Save and Return to Previous Page

Cancel and Return to Previous Page

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Logic Model Template Diagram
Access by clicking on View Diagram on top right of Template page.

ABC Test Program - Step 1b: Logic Model Template   Page 1 of 1

ABC Test Program - Step 1b: Logic Model Template

Preferred Long-term Outcome	Supporting Long-term Outcome	Intermediate Outcome	Initial Outcome	Outputs	Activities	Input -- Constraints	Input -- Resources

Preferred:
Caregivers
Support
Description:
Preferred:
Caregivers
Support
After saving,
click on the
'Add'l Ind'
link to add in
your
indicators.

https://agency.e-cimpact.com/forms/logicmodel/logicmodel_flowdiagram.aspx?OutcomeSettingID=1327&...   7/1/2009

Final Submission of Proposal Packet

Once the user has completed all of the proposal information the entire proposal can be electronically submitted to United Way. All program applications must have a status of *Verified* and *Include* in order to submit the entire proposal packet. Individual forms cannot be submitted independently of the entire agency's proposal application. The submission page is accessible by clicking on the *Submit Application* command under the save commands at the bottom of the RFP Application Overview Form Packets Status Screen. This function will not be available until all agency and proposal statuses are *verified*.

Final Submission of Funding Packet - Continued

This page will appear once the Submit Application command has been chosen. It requires entering the date that the proposal was approved for submission and the names of the Executive Director and the Board President. <u>Please note that typing in the names of these representatives is equivalent to "electronic signatures."</u> Once this data has been entered, click the *Submit Application* button to submit the proposal. The system will then automatically re-check all of the tables and data fields to ensure all individual applications are complete.

Once the agency's package has been submitted, it will receive a confirmation email to the email contact as selected on this page as seen below.

Resource Center

The *Resource Center* will offer access to documents containing information useful for the agency during the proposal cycle. Likewise, documents such as this training manual will be posted for use. Please note that Acrobat Reader 6.0 or higher must be installed to utilize this function. See the box on the left labeled Resource Center and click on the Seniors and Adults with Disabilities link. You will see the list of resources as on the example below. Click directly on the selected resource link, then click yes to open the document.

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United Way

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(1)2009 Senior & Adults w/Disabilities (Step 1)

Helping Youth and Young Adults Succeed

(1) 2008-09 Youth and Children RFP (Step 1)

(2) 2008-09 Youth and Children RFP (Step 2)

2008-09 Mid-Year Reporting

Resource Center

Youth Training & Resource Materials (3)

Seniors/Adults w/ DisabilitiesTraining Materials (5)

Reports

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Seniors/Adults w/ DisabilitiesTraining Materials > Resource Center

Resource Center

RFP Background
Background has need statement, agency eligibility, timeline, proposal process, scoring criteria, outcomes and proposal summary questions. - 7/6/2009

FAQs
Frequently-asked questions - 7/6/2009

Outcomes/Indicators List
List of outcomes and standard indicators - 7/6/2009

Timeline--RFP Process
Timeline rfp process - 7/6/2009

Log-In Instructions
log-in instructions for agencies - 7/6/2009

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