FY19-21 Core Investment Cycle Application Questions

Objective: Increase the # of individuals and families accessing family stability supports including health, basic needs and advocacy

- Sub-Objective 2: Advocacy

Agency profile

1. Executive director or chief executive officer contact information: name, job title, email address, phone number, extension.
2. Chief financial officer or primary finance contact information: name, job title, email address, phone number, extension.
3. Board chair contact information: name, job title, email address, phone number, extension.
4. Person completing funding application contact information: name, job title, email address, phone number, extension.
5. Organization’s mission statement.
6. Fiscal year end date.
7. Organizational revenue [FY 2017],
8. Projected organizational revenue [FY 2018],
9. Upload board list that includes member name and affiliation (i.e. current or former employer).

Demographic profile (Answers will not impact funding decisions.)

<table>
<thead>
<tr>
<th>Organizational Leadership Demographics</th>
<th>Executive Director</th>
<th>Senior Staff (Excluding ED)</th>
<th>Board of Directors</th>
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<tbody>
<tr>
<td>African American or Black</td>
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<td>American Indian or Alaska Native</td>
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<td>Individuals living with disAbilities</td>
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<tr>
<td>Individuals NOT living with disAbilities</td>
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Alignment

1. Does the organization’s mission and/or strategic plan include advocacy? (Y/N)

2. Does the organization have a full-time staff person whose formal responsibilities include advocacy? (Y/N)

3. Which community-level goal is the organization’s current policy and/or advocacy work connected to? [Check all that apply]
   - Ensure 90% of children read on grade level at the end of 3rd grade by 2030
   - Ensure an additional 50,000 Opportunity Youth (15-25) are connected to school and/or work by 2030
   - Ensure an additional 300,000 individuals live above 200% of the federal poverty level by 2030

4. In which of the following counties will the organization support advocacy work connected to the goal(s) checked above during the 2018 program year? [Check all that apply]
   - Atlantic
   - Burlington
   - Camden
   - Cape May
   - Cumberland
   - Delaware
   - Montgomery
   - Philadelphia

Program Design

5. Provide the start and end dates for the 2018 program year.

6. In 1,000 words or less, describe the organization’s approach to implementing the advocacy campaign(s) or initiative(s) that are directly connected to the community-level goal(s) checked as part of question three. Be sure to include a discussion of the following elements, if applicable:
   - Advocacy campaign/initiative design
   - Initiative-level goal setting
   - Alliance building and/or community organizing
   - Cultivation and use of stakeholder ‘Champions’
   - Use of the technology and/or media
   - Research, fundraising, and an ongoing-communications strategy
   - Intended impact (short, intermediate and long-term)

Partnership

7. In 1,000 words or less, describe the key coalitions that the organization leads and/or participates with as part of the implementation of the advocacy work described above. Explain the role of the organization within the alliance. Be sure to include a discussion of the following, if applicable:
• Role the organization has played in strengthening the work of the alliance
• Role the organization has played in coordinating or merging disparate alliances working toward common goals

8. In 1,000 words or less, describe any other key relationship(s) that the organization has cultivated in order to influence system-level change connected to one or more of UWGPSNJ’s community-level goals. Explain the ways in which these relationship(s) facilitate the organization’s ability to achieve the desired system’s change. Be sure to discuss the following, if applicable:
  • Elected officials, legislators, and/or legislative staff
  • Legal counsel
  • Public agencies
  • Media organizations
  • Influential individuals and/or groups (Excluding the coalitions discussed in the prior question)

Performance results:

1. How much?
   • # of unduplicated individuals who attended meetings/convenings
   • # of legislators engaged through meetings
   • # of new community members educated and engaged about advocacy issue(s)
   • # of new organizations engaged in advocacy issue(s)

2. How well?
   • # of meetings/convenings held
   • # of legislative meetings held
   • # of issue briefs and/or reports produced

3. Is anyone better off?
   • To be determined in partnership with newly funded community partners

4. UWGPSNJ will work with funded advocacy partners to identify the performance measures that support the nonprofit sector in understanding if anyone is better off in the short and long-term as a result of advocacy efforts. In 500 words or less, explain how the program defines the success of advocacy efforts. Discuss the quantitative and qualitative information that is tracked and analyzed in order to demonstrate program success in the short and long term.

5. Disaggregate the following indicator – number of unduplicated individuals who attended meetings/convenings in the 2017 program year – by:
   • Race/ethnicity
   • Gender
   • Age
   • Individuals above 200% of the federal poverty level
• Individuals at or below 200% of the federal poverty level
• Individuals served at site(s) in the following zip codes with concentrated poverty:
  - Atlantic County: 08217, 08401
  - Burlington County: 08015, 08068
  - Cape May County: 08251
  - Camden County: 08102, 08103, 08104, 08105
  - Cumberland County: 08321, 08324
  - Delaware County: 19013, 19014
  - Montgomery County: 19401, 19464
  - Philadelphia County: 19121, 19122, 19124, 19131, 19132, 19133, 19134, 19139, 19140, 19141, 19142, 19143, 19144
• Service across UWGPSNJ’s counties

6. In 250 words or less, provide any additional information that may assist reviewers in better understanding the performance results provided in this section.

7. In 500 words or less, describe how data is used to inform, strengthen and/or assess the organization’s advocacy initiative(s)’ progress toward initiative-level goals/objectives.

Organizational capacity

Learning community participation

1. Is the organization willing to commit staff time to participate with UWGPSNJ’s learning communities in accordance with the expectation outlined in the Funding Tier guidance document? (Y/N)

2. If the organization is applying to be a Regional or Key partner, upload the job description for the individual who will participate with the learning community meetings. [Enter N/A if applying to be a Supporting Partner in this objective.]

2-1-1

1. Is the organization’s information in the 2-1-1 (NJ and/or PA) database system? (Y/N)

2. If yes, is the organization’s information (location and service) updated in the 2-1-1 (NJ and/or PA) database? (Y/N)

3. In 200 words or less, describe how the organization promotes 2-1-1 (NJ and/or PA) as a resource for the individuals and families served.

Trauma-informed care

1. Which of the following most closely represents how the organization delivers trauma-informed services:
   • The organization’s services are not currently trauma-informed.
The organization implements a trauma-informed approach when delivering some services.
- The organization implements a trauma-informed approach when delivering most services.
- The organization implements a trauma-informed approach when delivering all services.

**Two-generation approach**

1. Which of the following most closely represents how the organization delivers services to more than one generation of clients:
   - The organization does not currently offer programming or assistance to the families of clients.
   - The organization offers programming or assistance to the families of clients.
   - The organization offers programming or assistance to and tracks outcomes for the families of clients.

**Volunteer management**

1. Total # of volunteers engaged during fiscal year 2017.
2. Total # of volunteers engaged during fiscal year 2016.
3. Who on staff is responsible for volunteer management:
   - Organization has one or more FTEs dedicated to volunteer management
   - Organization dedicates part of a FTE to volunteer management
   - Volunteer management is not part of anyone’s specific job responsibilities and is treated as “other duties as assigned”
   - Not applicable

4. In 350 words or less, describe the organization’s approach to managing volunteers. [Enter N/A if the organization does not currently engage volunteers in its work.]

5. In 350 words or less, describe the organization’s approach to utilizing volunteers to achieve its program goals and/or mission. Discuss the positive programmatic or organizational results achieved as a result of volunteer activities. Please limit the response to the last three years. [Enter N/A if the organization does not currently engage volunteers in its work.]

**Program budget**

Use the template below to provide an overview of the programmatic revenue and expenses required to achieve the performance results (i.e. outcomes) specified in the results section. Provide actual expense and revenue information for the 2016 and 2017 program year. Provide projected expense and revenue information for the 2018 program year. The template categories are directly aligned with those that would be reported in the organization’s audited financial statements and/or 990. The definitions below provide additional clarification.

1. The total indicated in the Expenses column is what percentage of the organization's overall budget? [Separate calculation for 2016, 2017, and 2018.]
2. Explain the dollar amount in the Other Income and/or Other Expenses columns for 2016, 2017, and 2018. [Enter N/A if box was left empty.]

3. What is the cost per unit of service/customer served in 2016, 2017, and 2018?

4. Explain how the cost per unit of service/customer served was calculated for 2016, 2017, and 2018.

5. List the organization’s top five funders and corresponding funding amounts for 2016, 2017, and 2018.

**Direct Expenses** – Program services expenses should be included here. Direct expenses include any costs associated with delivering program services. Examples of such expenses include: rent, consumable supplies, client activities and incentives, postage, travel, marketing, outreach, etc. Do not include costs related to training, professional development, program staff salaries, program staff benefits, program staff payroll taxes, subcontractors, consultants or professional fees in this line.

**Other Expenses** – Support services expenses should be included here. Examples of costs related to support services include: printing, meeting costs, insurance, dues, subscriptions, etc. Do not include fundraising, consultant fees, administrative overhead, or training, conference and related travel costs in this line.

*Continue to Next Page for Budget Template*
<table>
<thead>
<tr>
<th></th>
<th>Revenue</th>
<th>Expenses</th>
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</thead>
<tbody>
<tr>
<td>United Way of Greater Philadelphia &amp; Southern New Jersey</td>
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<tr>
<td>Corporations, Foundations and/or Other United Ways</td>
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<tr>
<td>Government Grants and/or Contracts</td>
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<tr>
<td>Fundraising</td>
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<tr>
<td>Program Service Fees, Memberships and/or Dues</td>
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<tr>
<td>Rental Income and/or Facilities Management Fees</td>
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<tr>
<td>Total</td>
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</tbody>
</table>

*Organizations should provide actual or projected information based on fiscal year end and timing of the end-of-year financial reconciliation.*