

FY19-21 Core Investment Cycle Application Questions

Objective: Increase # of adults earning a living wage

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, term start date, term end date.
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.)

Organizational Leadership Demographics	Executive Director	Senior Staff (Excluding ED)	Board of Directors
African American or Black			
American Indian or Alaska Native			
Asian			
Native Hawaiian or Other Pacific Islander			
White			
Other Race			
Not disclosed			
Total			
Hispanic or Latino			
Not Hispanic or Latino			
Not disclosed			
Total			
Male			
Female			
Not disclosed			
Total			
Individuals living with disAbilities			
Individuals NOT living with disAbilities			
Not disclosed			
Total			

Alignment

Program design

1. Provide the start and end dates for the 2017 program year.
2. In which of the following industries did the organization place job seekers and/or advance incumbent workers during the 2016 and 2017 program year:
 - Business and financial services
 - Construction and infrastructure
 - Early childhood education
 - Healthcare
 - Manufacturing and logistics
 - Retail and hospitality
 - Technology services
 - Other_____
 - None of the above
3. *In 750 words or less*, describe the organization's workforce program. Make a clear connection between the program design and intended program impact. Be sure to include a discussion of the following elements, if applicable:
 - Community context
 - Duration and frequency of program activities
 - Details on program design/structure (such as recruitment, screening, staffing, education, training, job placement, and/or advancement activities)
 - Intended program impact
4. *In 500 words or less*, explain why the organization chose the stated approach to providing workforce programming. Describe the community needs, client needs, employer/industry needs, published or unpublished research, resources, best practices, and/or experiences that informed the program's design.

Targeted service delivery

5. Which of the following targeted populations does the program have an intentional strategy for recruiting and serving? [Check all that apply]
 - Immigrants/Refugees
 - LGBTQIA community
 - Opportunity Youth
 - People experiencing intimate partner violence
 - People experiencing homelessness and/or housing instability
 - People experiencing substance abuse issues
 - People experiencing mental health issues
 - People living with physical disAbilities
 - People living with mental disAbilities
 - People living at or below 200% of the federal poverty level
 - People with low literacy and/or low numeracy skills
 - Returning citizens

- Recipients of TANF
- Veterans
- Other_____
- None of the above

6. *In 250 words or less*, describe how the program determines the needs of the target population(s) checked in response to the previous question.
7. *In 500 words or less*, explain how the program tailors its staff training, recruitment/identification, retention, job training, and/or job placement/advancement services to meet the need(s) of the target population(s) checked in response to the previous question.

Partnership

8. *In 500 words or less*, describe the key employer and/or industry partnership(s) the organization leverages in the delivery of the workforce program. Include a discussion of the organization's strategy for engaging employers and how these partnership(s) respond to employer/industry needs and contribute to the organization's ability to achieve the intended impact.
9. *In 500 words or less*, describe any other key partnership(s) the organization leverages to deliver the workforce program, especially partnerships that ensure individuals and/or families have access to stability supports. Include a discussion of how these partnership(s) contribute to the organization's ability to achieve the intended impact. [*Exclude* a discussion of employer and/or industry partnerships in this response.]

Performance results

Each performance measure has an alternate option: "Organization *does not* collect data for this performance measure." Fiscal year 2016, fiscal year 2017, and projected fiscal year 2018 performance results will be collected.

1. How much?
 - # of unduplicated individuals served
 - # of unduplicated individuals enrolled in a job training program
 - # of unduplicated incumbent workers enrolled in a job training program
 - # of unduplicated individuals enrolled in a job training program who are members of one or more of the following target groups: veterans, individuals living with disabilities [physical or mental], returning citizens and/or recipients of TANF
 - # of unduplicated individuals enrolled in an employer-demand driven job training program
 - # of unduplicated individuals enrolled in a credentialing program
 - # of unduplicated individuals enrolled in a high school diploma or GED attainment program
2. How well?
 - # of unduplicated individuals who completed a job training program
 - # of unduplicated individuals who completed an employer-demand driven job training program

- # of unduplicated individuals who completed a credentialing program
 - # of unduplicated individuals who completed a high school diploma or GED attainment program
 - # of unduplicated individuals who received an industry-recognized credential
 - # of unduplicated individuals who received their high school diploma or GED
 - # of unduplicated individuals who were enrolled in at least one public benefit
3. Is anyone better off?
- # of unduplicated individuals placed in a job
 - # of unduplicated individuals placed in a job who are members of one or more of the following targeted groups: veterans, individuals with disabilities [physical or mental], returning citizens and/or recipients of TANF
 - # of unduplicated individuals placed in a job in which they earned a living wage
 - # of unduplicated individuals placed in a job connected to a career pathway
 - # of unduplicated incumbent workers who advanced in their roles
4. List the name(s) of the workforce program(s) that the organization used to achieve the performance results provided above.
5. Which of the following work-based training opportunities were utilized by the job seekers and/or incumbent workers trained, placed, and/or advanced during the 2016 and 2017 program years? [Check all that apply]
- Apprenticeships
 - Earn and learn opportunities
 - Internships
 - Job shadowing
 - On-the-job training
 - Pre-apprenticeships
 - Transitional jobs
 - Other _____
 - None of the above
6. Disaggregate the following indicator – number of unduplicated individuals enrolled in a job training program 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:
 - Individuals served *from* 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
 Philadelphia County: 19121, 19122, 19124, 19131, 19132, 19133, 19134, 19139,
 19140, 19141, 19142, 19143, 19144

- Service across UWGPSNJ's counties
7. *In 250 words or less*, provide any additional information that may assist reviewers in better understanding the performance results provided in this section.
 8. *In 500 words or less*, describe how the organization uses client, program implementation, and outcome data to improve program quality and assess progress toward program goals/objectives.

Organizational capacity

Learning community participation

1. Is the organization willing to commit staff 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.

Advocacy

1. *In 500 words or less*, describe the organization's experience advocating for solutions to improve education, financial stability, and/or community well being. Include an overview of relevant organizational alliances or collaborations, successes achieved as a result of the advocacy work, and how the advocacy effort is connected to the organization's programmatic work and/or mission. Limit the response to the last three years. [Enter N/A if the organization does not currently engage with any advocacy efforts.]

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. Include an overview of the positive programmatic and/or organizational results achieved as a result of volunteer activities. 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.

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REVENUE				EXPENSES			
	2016 Actual	*2017	2018 Projected		2016 Actual	*2017	2018 Projected
United Way of Greater Philadelphia & Southern New Jersey				Salaries, Benefits & Payroll taxes			
Corporations, Foundations and/or Other United Ways				Subcontractors, Consultants and/or Professional Fees			
Government Grants and/or Contracts				Indirect Cost/Administrative Overhead			
Fundraising				Fundraising Costs			
Program Service Fees, Memberships and/or Dues				Training and/or Conferences and Training/Conference Related Travel Costs			
Rental Income and/or Facilities Management Fees				Additional Direct Expenses			
Other Income				Other Expenses			
Total				Total			

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