United Way
East Ontario

2024 CALL FOR PROPOSALS GUIDEBOOK (RENFREW COUNTY)

NOTE TO READERS:

This guidebook is intended as a comprehensive guide to the 2024 United Way East Ontario Call for Proposals Process. Although you will find sections of this guidebook in original form or summarized on our website, this document is meant to be 'one stop shopping' for instructions. The comprehensive nature of this guidebook is intended to eliminate the need to search out information in multiple places. We encourage you to make use of the table of contents and document hyperlinks when looking for specific information. United Way East Ontario staff are available to answer questions, but we encourage you to review the relevant portion of the guidebook before contacting us. This guide is meant for applicants from Renfrew County.

UNITED WAY EAST ONTARIO INVESTMENT TEAM CONTACT INFORMATION:

Email: agencyinfo@unitedwayeo.ca

Voicemail: 613-683-3861

Voicemail and email are checked daily, and questions are referred to the appropriate staff.

TABLE OF CONTENTS

TIMELINE

DATE	STEP
November 21-22, 2023	Agency Information Sessions (optional)
January 16, 2024	Application available in portal
February 21, 2024	Application deadline (1pm ET)
February – April 2024	Assessment process
Early May 2024	Notification to Applicants
July 1, 2024	Funding Agreement begins for successful applicants

GENERAL INSTRUCTIONS FOR PROPOSALS (AGENCIES NOT REQUIRING SPONSORSHIP)

Use the checklist below to ensure all parts of your application are complete:

The first step to completing your application is to review the requirements for step 1 and step 2 in the agency portal. These requirements include:

STEP 1

☐ 1. Update your organizational details (or create your organizational profile if you have not applied before).

☐ 2. Within the eligibility form, answer a series of questions to determine if you require a sponsorship agreement and if your agency is eligible for funding from United Way East Ontario. If your agency requires sponsorship, please refer to the instructions on the next page.

☐ 3. Upload the five required documents requested in the document checklist. Upload the annual report if available. Required documents: audited financial statements*, current list of board members, most recent approved annual general meeting minutes, current fiscal year organization budget (unaudited) and proof of sufficient and current liability insurance. A new set of documents must be submitted, even if you applied last year.

**Charities with revenues less than $250,000 may submit reviewed financial statements only if they have been funded by UWEO in any funding stream within the past 5 years (2018/19 – 2023) and are in good standing with the organization.*

STEP 2

☐ 1. Create and complete an application form for one or more proposals. This includes uploading a signature page.

☐ 2. Submit the proposal by February 21st, 2024 at 1pm ET.

☐ 3. Be sure to save a pdf copy of your proposal(s), using the download function in the agency portal (for your own record keeping purposes).

GENERAL INSTRUCTIONS FOR PROPOSALS (AGENCIES REQUIRING SPONSORSHIP)

Use the checklist below to ensure all parts of your application are complete:

The first step to completing your request is to review the requirements for step 1 and step 2 in the agency portal. These requirements include:

STEP 1

☐ 1. Update your organizational details (or create your organizational profile if you have not applied before).

☐ ☐ 2. Within 'organization details' answer a series of questions to determine if you require a sponsorship agreement and if your agency is eligible for funding from United Way East Ontario. If *any* of the criteria are not met, applicants must establish a formal partner sponsorship agreement with a registered charity (with its own RR number) that meets *all* of the criteria.

3. Ensure the five required documents requested of the sponsoring agency are uploaded in the **document checklist.** Required documents: audited financial statements, current list of board members, most recent approved annual general meeting minutes, current fiscal year organization budget (unaudited) and proof of sufficient and current liability insurance.

☐ 4. The applicant agency must submit any documents that are available for their own organization under their own document checklist. The applicant agency must also upload the fully executed partner sponsorship authorization form. Therefore, an application from an agency requiring a sponsor would have two document checklists, one associated with the sponsoring agency which would have all required documents, and one associated with the applicant agency which would have only those documents which are available.

STEP 2

☐ 1. Create and complete an application form for one or more proposals. This includes uploading a signature page.

☐ 2. Submit the proposal by February 21, 2024, at 1pm ET.

☐ 3. Be sure to save a pdf copy of your proposal(s), using the download function in the agency portal (for your own record keeping purposes).

FREQUENTLY ASKED QUESTIONS (FAQ)

Q What are the main changes between this years' Call for Proposal (CFP) 2024 and the last CFP 2022?

A

- Only one application is needed for multi-regional programs.
- All agencies must apply using the new online grant management system (Survey Monkey Apply).

NOTE:

- Only one proposal per target population per Focus Area may be submitted. If a client or beneficiary could feasibly attend both of your programs, then they should be submitted as one application.

Q Do you require a signature page? Are any other documents required for submission?

A All agencies are required to submit a signature page. The signature page is the last page on the application in the Agency Portal and must be signed prior to submitting the application. Applicants must also complete the document checklist of 5 documents.

Q Can I submit a hard copy of my Proposal?

A No. Proposals must be submitted using the on-line Agency Portal. We are not able to accept late requests or those that are not submitted through the Portal. All documents must be uploaded to the Portal, emails are also not accepted.

Q Should an applicant agency submit letters of support?

A No. Letters of support are not required. No supporting documentation will be accepted or considered as part of the assessment process.

Q Do you require references?

A No. References are not required. No supporting documentation will be considered as part of the assessment process.

Q Can agencies whose revenue is less than $250,000 submit a financial review instead of audited financial statements?

A Yes. Charities with revenues less than $250,000 may submit reviewed financial statements only if they have been funded by United Way East Ontario in any funding stream within the past 5 years (2018/19 – 2023) and are in good standing with the organization.

Q Is there a limit to the number of proposals that an applicant can submit?

A No, there is no limit to the number of proposals an organization can submit. An organization can submit more than one proposal under each or multiple strategic priorities. However, each proposal must be for a different target population.

Q Is there a limit to the amount of funding an applicant can ask for per proposal?

A No, there is no limit, but the overall funds available are limited. Applicant agencies should ask for what is required to achieve results that support the strategic priority identified in the proposal. However, applicant agencies should refer to the current investment listing to have an idea of how much funds may be available (amount available always depends on campaign results). Keep in mind that the amount of funding awarded may be less than the amount requested.

Q Is there a limit to the overhead amount/percentage that an applicant agency can include in their proposed program/project budget?

A No, there is no limit. Applicant agencies should include what they require as overhead within the Administrative Expenses budget category.

Q Does an applicant agency submitting under a partnering sponsor organization need to submit their own organizational documents or their partnering sponsor's organizational documents? (e.g. Audited Financial Statements, Annual General Meeting Minutes, Board of Directors list, Proof of sufficient liability insurance)

A The applicant agency must submit any documents that are available for their own organization under their own document checklist. The applicant agency must also upload the fully executed partner sponsorship authorization form. Therefore, an application from an agency requiring a sponsor would have two document checklists, one associated with the sponsoring agency which would have all required documents, and one associated with the applicant agency which would have only those documents which are available.

Q Is there a partner sponsorship agreement template?

A No, partnering agencies should develop an agreement together. Within the agreement, the details of what each partner is contributing to the program (i.e., space, time, activities, etc.) should be clearly outlined. The agreement should be signed by Executive Directors as well as the Chairs of the Boards of Directors of each partnering agency. United Way East Ontario only requires that a **Partner Sponsorship Authorization Form** be completed and signed outlining the accountabilities of both parties.

Q What if my organization serves residents in multiple counties and/or cities?

A You will need to need to submit a single application if you serve more than one of the four catchment areas. For example, if your program serves Ottawa, Renfrew County and Lanark County, you need to choose the multi-region option in the portal and then choose the focus area under which your program will be carried out.

Please note that if you serve multiple towns/communities/neighbourhoods within a single county or city, only one application is needed. The above information is only applicable if your program spans more than one of the four catchment areas (City of Ottawa, Lanark County, Renfrew County, and the United Counties of Prescott and Russell).

Q Who are these Assessors? What are their qualifications?

A As with past Calls for Proposals, the assessments and funding recommendations are completed by committed volunteers who have an in-depth understanding of the community and of each Strategic Priority sector. The assessors are members of United Way's Investment Committee. The Investment Committee (IC) will lead the assessment process, supported by volunteer community subject matter experts and staff.

Q Will the Assessors have access to other documentation or information, such as our program reports?

A Assessors will have access to program reports, but are not required to review them as part of the assessment process. Strategic Priority Directors (United Way staff) will provide assessors with an overview of agency reporting and results prior to discussion of applications for that agency. However, proposals should be written as stand-alone documents, there should be no assumption that the assessors know the applicant agencies or program.

Q What is the Assessment process after we submit?

A The assessors will score and rank each proposal based on evidence provided that supports that the proposed program or project will deliver measurable results, its mechanisms for tracking and evaluating the program's effectiveness, its collaboration with other community organizations, the full budget, etc. For more details, see the Application and Assessment Process section of this guide.

Based on the careful evaluation and discussion of the merits of each proposal, Investment Committee (IC) will then make funding recommendations. These recommendations are subsequently reviewed and approved by United Way's Corporate Oversight Committee.

SURVEY MONKEY APPLY (AGENCY PORTAL) FAQ

Q How do I access the Agency Portal?

A If you have accessed the Agency Portal before, then you should still have access. Your username is your email address. Go to https://unitedwayeo.smapply.ca/acc/l/. Click Forgot Password and follow the instructions to reset your password if you have forgotten your password. If you have never had access, go to https://unitedwayeo.smapply.ca/acc/l/, select 'register' and follow instructions to receive Agency Portal access. See full instructions in the Getting Started in the Agency Portal section of this guidebook.

Q I don't understand how to upload documents

A Please see the relevant guidance in the *instructions by question* section for Acknowledgement and Signatures.

Q The portal is behaving oddly e.g. the screen is blank, the page doesn't refresh properly etc….

A Possible causes:

1) There has been a brief internet interruption or the Survey Monkey Apply server is experiencing difficulties. Remedy – close your web browser, and restart. You may have to wait a few minutes and try again.

2) Your chosen web browser does not operate optimally with Survey Monkey Apply. Survey Monkey Apply works best with Google Chrome. People using Internet Explorer seem to experience the most difficulties. Remedy – download and install Google Chrome (free) and use it as your web browser when accessing the Agency Portal.

3) Check to ensure that adblocker is disabled.

Q Can more than one person edit the Proposal at the same time?

A No. Only one person at a time can edit the Proposal. It works similar to how things would on a shared drive. If one person logs in and opens the proposal they can make changes. If another person logs in with a different user name, they would be able to open the document, but not make changes (e.g. read only). It is not possible to get around this by two people logging into the document using the same user name. This will result in lost information as the document won't save properly.

If your question is not addressed here, please contact us at agencyinfo@unitedwayeo.ca

UNITED WAY EAST ONTARIO INVESTMENT GUIDING PRINCIPLES

INVESTMENT GUIDING PRINCIPLES

- **Invest resources where they needed the most and where they will have the greatest impact.**
- Invest to make a measurable difference in the community.
- Invest in a range of strategies to advance the strategic priorities including front line programs and services, convening, research and speaking up.
- Invest in accordance with the evolution of the strategic priorities that reflect the needs of the community.
- Invest to promote collaborative efforts to advance the strategic priorities.

ELIGIBILITY CRITERIA

GENERAL ELIGIBILITY CRITERIA

All applicants **must** meet all of following criteria:

- Applicant must be a registered charity (with its own RR number).
- Applicant must maintain a volunteer board that meets regularly.
- Applicant must host an Annual General Meeting.
- Applicant must have financial statements that have been audited by a licensed public accountant.*

** Charities with revenues less than $250,000 may submit reviewed financial statements only if they have been funded by United Way East Ontario in any funding stream within the past 5 years (2018/19 – 2023) and are in good standing with the organization.*

If *<u>any</u>* of the above criteria are not met, applicants must enter into a formal partner sponsorship agreement with a registered charity (with its own RR Number) that meets *<u>all</u>* of the above criteria.

OTHER CRITERIA

- The activities proposed by the applicant must benefit residents in one of United Way East Ontario's catchment areas (Ottawa, Lanark County, Renfrew County, and the United Counties of Prescott and Russell).
- The applicant's primary focus and mandate must be within the social services sector.
- The request submitted by the applicant must clearly support stated strategic priority(s).
- The applicant (or partnering sponsor organization, in the case of sponsored applicants) must be financially solvent.
- The applicant must carry sufficient liability insurance (at least $2 million) to cover the program/project seeking United Way funding.
- ***Late or incomplete submissions will not be accepted.***

APPLICANTS INELIGIBLE FOR FUNDING

- Registered charitable organizations sponsoring for-profit organizations or for-profit ventures, with the exception of social enterprise or non-profit community economic development activities.
- Hospitals or medical treatment programs.
- Educational institutions and organizations, including school boards, schools, universities, colleges and parent-teacher associations.
- Faith-based organizations that require an adherence to or promotion of a religious faith as a condition of receiving supports or services.
- Political parties.
- Fundraising events or organizations, service clubs and foundations that act primarily to raise funds for distribution to other organizations, with the exception of foundations that are raising funds for a directly *related* organization.
- Organizations whose policies or practices contravene the Ontario Human Rights Code.

COSTS INELIGIBLE FOR FUNDING

- Retirement of debts or budget deficits.
- Costs for large capital equipment or expenses related to construction, or the development of facilities.
- Wage subsidies for program participants.

SPONSOR PARTNERSHIP

- If *any* of the general criteria are not met, applicants must establish a formal partner sponsorship agreement with a registered charity (with its own RR Number) that meets *all* of the general criteria.

APPLICATION AND ASSESSMENT PROCESS

CALL FOR PROPOSALS SUPPORT

- **Information on United Way East Ontario website:** https://www.unitedwayeo.ca/agencies/
- **Agency Information Sessions were held (November 21-22, 2023)**
- **Proposal Comprehensive Guide 2024 – written guidance on all aspects of Full Proposal Process**

We encourage you to make use of the Comprehensive Guide 2024 table of contents and document hyperlinks when looking for specific information. United Way East Ontario staff are available to answer questions, but we encourage you to review the relevant portion of the guide before contacting us.

United Way East Ontario Investment team contact information:

- **Email:** agencyinfo@unitedwayeo.ca
- **Voicemail: 613-683-3861**

  - **Voicemail and email are checked daily and questions are referred to the appropriate staff.**
  - **We encourage applicants to contact us early in the application process to ensure we can provide proper support.**

COMMUNITY RESOURCES

Ottawa Neighbourhood Study

Ottawa Neighbourhood Study (ONS) is about location-based planning. The data available within ONS can be instrumental in planning programs and services within your community. The tool can be used to:

- Pick a location and we'll show you who lives there.
- Pick a population and we'll show you where they live.

ONS is about evidence-based planning:

- It's about who, when, where, what, why, and then how.
- When you know who lives where and what their circumstances are, you'll know more about how your programs and other resources will have the most impact.

ONS is about measuring impact:

- Choose your indicators, find your data, set your baseline, track changes over time.
- Has your program made a difference?

Need help? Contact ONS (http://neighbourhoodstudy.ca/contact/).

Neighbourhood Equity Index

The Ottawa Neighbourhood Equity Index is a tool to assess and compare unnecessary and unfair differences at a neighbourhood level on factors impacting wellbeing. The Index measures how each neighbourhood is doing in five domains of wellbeing supported by 28 indicators.

More information available at: https://neighbourhoodequity.ca/

Eastern Ontario Regional Data Project

The regional data project provide maps and dashboards with data about a number of communities and issue areas across East Ontario, including youth, seniors, and families.

More information available at: https://eastern-ontario-regional-data-project-spc-ottawa.hub.arcgis.com/

Senior Vulnerability Index

The Senior Vulnerability Index uses federal census data to depict vulnerability among seniors in East Ontario communities based on four variables – seniors aged 80+, low income, education, and living alone.

The SVI can be accessed here

ASSESSMENT PROCESS

- **Late applications will not be accepted.**
- All documents must be submitted through the on-line Agency portal.

Assessor Recruitment

Proposals will be reviewed and assessed by Assessment Teams comprised of trained subject matter experts and volunteer Investment Committee members with the support of United Way staff.

Criteria:
Investment Committee has a mix of members so that all of the following criteria are represented:

- Experience with evaluation, allocations and other funders
- In-depth knowledge of the sector and understanding of the related strategic priorities
- Experience with the federal/provincial/city sectors
- Experience with other community organizations/agencies
- Bilingual fluency

Assessors will:

- Score
- Discuss
- Rank proposals
- **Full Assessment tool and rubric are available (see next page)**

All proposals that meet the eligibility criteria will be weighted according to the degree to which they meet the proposal Evaluation Criteria.

- Information from the most recent program reports will be used in the assessment process for previously funded programs/projects.

ASSESSMENT CRITERIA

Scoring Range: Type of score an assessor can assign 4= a scale of 0 to 4 or a flag statement e.g. clear or unclear depending on the assessors determination and the particular flag

Ranking Weight: A multiplier or amount of significance assigned to that particular question. E.g. if the weight is 2 and the assessor scored a 3 then the total weighted score for that questions would be 6.

Maximum Points Possible: If the criteria received the highest available score (which is always 4), the result of multiplying that score by the ranking weight. For instance ranking weight is 1.5 and a 4 score was given, so the maximum possible points is 6

Question: This refers to the question in the application to which the criteria/consideration applies.

CRITERIA			**Considerations in Scoring**	**RANKING WEIGHT**	**SCORING RANGE**	**MAXIMUM POINTS POSSIBLE**
Question	**Criteria**					
A1	**1**	Track record in successfully delivering programs/services supported by specific results	• How successful is the agency at delivering other programs/projects that it runs? • Does the agency have a history of successful/unsuccessful programs? • Are the programs similar (e.g. scope, scale, method, issue being addressed) to what is being proposed? • Are the results provided specific and demonstrative of real/significant impact? Examples of specificity would include: providing the actual percentage change in program outcomes, citing the number and extent that people were impacted, citing specific policy or systemic changes that are attributable to the program etc...	2	4	8
A2	**2**	Ability/ capacity to deliver proposed program /project	• Does the agency, including management and staff, have the ability and capacity (i.e. experience implementing/managing similar program/projects, etc) to deliver the proposed program? • Is the agency representative of the equity seeking/equity deserving communities that they serve?	2	4	8

A3	**3**	Program/project aligns with core mission of the applicant agency	• Is the program/project consistent with the core mission of the applicant agency •Is there evidence of mission-drift?	Flag	Aligned / Not Aligned	Flag
A4	**4**	Coalition membership and individual roles and structure are clear	• Does Agency provide names of coalition members, indicate lead agency and describe roles of the respective members? • Does the description provide clarity regarding what members bring to the coalition?	Flag	Clear/ Unclear	Flag
						16
B1	**5**	Strength of alignment against strategic priority/focus area (per Appendix)	• Please refer to the definition for the strategic priority in question. • Evaluate the evidence provided to clearly show that the program/project supports and will help to achieve the strategic priority.	4.5	4	18
B2-5	**6**	Social Enterprise	**If applicable:** • Does the description adequately outline how this program is a social enterprise? •Does the description adequately explain how this program leads to employment that adheres to Ontario Labour Standards? •If the strategic priority is related to employment the enterprise must also increase participant's opportunities to succeed in East Ontario's labour market, ensure dignity of choice, and foster an inclusive workplace and/or community • If the participants are not being paid at least minimum wage, do piecework formulas result in an equivalent to minimum wage or greater?	.5	4	2
						20
C2	**7**	Program/ project is in partnership (formal or informal) with other partners	• Partnerships can be either informal (i.e. in-kind support, sharing of information, assistance with the evaluation process, etc.) or formal (i.e. signed partnership agreements, formal collaboration, etc.).	1	4	4

			• Is the applicant agency working in partnership with other organizations to implement this program? • Have partner names been provided and roles defined? • Has the nature of the partnership been defined? • Has the funding or in-kind contribution been described?			
C3	**8**	Program/ project follows a Collective Impact model	• To what extent does this program/project adhere to a collective impact model? • How far along is this agency in satisfying the five conditions? • Is the evidence of the five conditions being met clear and convincing? • Is there satisfactory justification for the achievement percentages?	1.5	4	6
C4	**9**	Geographic duplication	• Will the program be delivered in multiple geographic locations? •Are there other programs/projects in the same geographic area offering the same, or highly similar services? • If duplication exists, is that duplication necessary to fill a gap in service? • The answer will allow UWEO to ensure that resources are invested efficiently and effectively.	Flag	Duplication / No Duplication	Flag
						10
D1	**10**	Greatest Need, Greatest Impact	• Does the description go beyond the strategic priority description to explain the **specific need** being addressed? • Is there a clear description of who the specific target population is and how they would be **impacted** by the program? • Is there a causal link between the described impact and the need? • Is the impact realistic considering the scope of the project?	2	4	8

D1 &C 4	**11**	Vulnerable populations (includes considerations for geographic, priority communities, equity deserving groups, etc.)	• Does the program/project serve vulnerable populations? • Is the program/ project targeting a geographic area/neighbourhood that has large populations of individuals from vulnerable populations? • Are vulnerable populations a primary focus of the program/project? • Does the program/project serve equity seeking/equity deserving groups?	2	4	8
D2 & D3	**12**	Program/ project and Activities Description	• Is the goal of the program/project clearly stated? • Is there a clear link between the stated activities and the ultimate goal? • Is the 'what, who, when, where and how' explained? • Will the activities presented result in the achievement of the stated results? • Are the activities reasonable? Are there unrealistic expectations?	2	4	8
						24
E 2	**13**	Activities and results relationship is backed by evidence-based/evidence-informed research	• Is the relationship between the proposed activities and the anticipated results evidence-informed? • How well is the relationship articulated? • Evidence can take the form of internal research or external research. • Is the evidence presented relevant?	1	4	4
E 3 & E 4	**14**	Targets and Indicators, which provide evidence on achievement of planned results, are strong	• Is the agency able to report on most or all of the common indicators selected as a priority for this goal? • If the agency is not reporting on common indicators is the explanation satisfactory and provide assurances that this agency can still provide strong results that are aligned with the desired outcomes of the goal? Have they provided at least one or two strong alternative outcome indicators (is anyone better off)?	4	4	16

			• Are the targets selected ambitious enough to be a solid investment, yet achievable given the staffing and financial resources? • If custom indicators are developed will they tell us how much was done, how well it was done or if anyone is better off? Are they SMART (specific, measurable, achievable, realistic and time-bound)? Do custom indicators proposed align with what United Way is trying to achieve with the selected strategic priority?			
						20
F	**15**	Program/project has diverse funding sources (financial and in-kind)	• What proportion of the program/project budget is being requested from United Way East Ontario? • Is there a heavy reliance on United Way East Ontario (or any other single funder) to run the program? • Is the program sustainable?	0.5	4	2
F	**16**	Expenses are comprehensive and realistic	• Does the proposal include all expenses related to the program/project? • Are there any major expenditures that *should* be listed, but are not? •Are the expenses realistic? *i.e.* Are they true reflections of the cost associated with each line item? • Are budget notes present and sufficiently detailed? • Are in-kind costs included?	1	4	4
F	**17**	Cost Efficiency	• Are the costs reasonable given the individuals being assisted? • Are costs reasonable given the depth and resources needed for the intervention? • Are the costs reasonable given the numbers of clients being assisted? • Please keep in mind that geographic area, types of clients, types of services provided can all have an impact on cost efficiency (i.e. similar programs offered in different geographic areas can have widely different costs depending on volunteer engagement, availability of other neighbourhood supports, etc)	1	4	4
						10

					Total	**100**

Scoring Rubric				
0 (No Evidence Presented)	1 (Poor Evidence Presented)	2 (Fair Evidence Presented)	3 (Strong Evidence Presented)	4 (Excellent Evidence Presented)
Question is not answered, or no information provided in the response addresses the question.	The content lacks meaningful detail and/or demonstrates a lack of preparation. The content reflects a lack of understanding of the elements needed for the program/project to achieve results that will contribute to achieving the strategic priority.	The content lacks some meaningful detail and requires important additional information in order to be reasonably comprehensive OR the response suggests the criteria was not fully understood. The content reflects a partial understanding of the elements needed for the program/project to achieve results that will contribute to achieving the strategic priority.	The content addresses the criteria in a reasonably comprehensive manner, with significantly detailed and mostly accurate information. The content reflects a solid understanding of the elements needed for the program/project to achieve results that will contribute to achieving the strategic priority but may require additional specificity, support or elaboration.	The content addresses the criteria with specific, appropriately detailed and accurate information. The content reflects a thorough understanding of the elements needed for the program/project to achieve results that will contribute to achieving the strategic priority.

ACCESSING AND EDITING YOUR PROPOSAL

Once you have created a proposal in the Agency Portal and have saved it, you or other people in your organization may access and edit the proposal. Each person wishing to access the proposal should have their own log in in Survey Monkey Apply. Similar to working with documents on a shared drive, only one person may edit a proposal at any given time, but as soon as one person is done with their work and closed the proposal, another person may access the proposal.

GENERAL ADVICE

The following guidelines were created to help you develop your proposal. They are drawn from the comments and feedback of our volunteer assessors and staff. Please keep the following points in mind when completing your Proposal.

- **Use of Acronyms.** In order to save space, agency resort to using acronyms which becomes difficult to follow at times. If you must use Acronyms, spell it out fully at least once in each section of the proposal. Other information or statements do not need to be repeated in multiple sections.
- **Who, where.** Be extremely clear who your program is serving, where the program is operating (especially if multiple locations).
- **Pay very close attention to the guidelines.**
- **Get Feedback.** Have someone outside your agency, who is experienced in the field review your proposal. Get as much feedback as you can.
- **Be concise and specific.** Given the word count limit on the fields, use the available space wisely by being concise, concrete and specific in your answer. When answering a question, make sure you are directly answering the question and all parts of the question. Avoid trying to fill in space with extraneous information and avoid trying to fit every criteria perfectly. Please ensure that your proposed activities clearly outline the program/project.
- **Budget your time.** Give yourself enough time to have all documents required for the document checklist and the signature page prepared well in advance of the deadline.
- **Beware of assumptions**. While our Assessors are knowledgeable of the sector within which they are assessing, do not assume that they know your program/project in great detail. Please ensure that your request clearly explains why and how United Way funding would be used.
- **Know your audience.** Tailor your proposal to a broad but educated audience; keep in mind that your readers may not have the same familiarity with terminology and acronyms of your field.
- **Consistency is key.** Please ensure that your proposal depicts a consistent and complete story of what you are proposing to do. Make sure the information presented in one question response does not contradict the information in another. This is especially important when multiple authors are writing a request.
- **Support statements with data.** For instance, when discussing agency capacity, it is not enough to state that the program was a success, provide examples of key results that demonstrate success.
- **United Way funding is for programs, rather than core agency funding**. Agencies submitting proposals that do not define a clear program, reduce their chances of being funded as it is unlikely that ALL agency activities are tightly aligned to the strategic priority.

WORD LIMITS

Please note that certain text fields in the Proposal form have character limits. If this limit is surpassed you will see by how many words the excess is. This will not prevent you from saving your proposal, using the ‘save draft’ button but it will prevent you from submitting the application or using the ‘save’ button.

GETTING STARTED IN THE AGENCY PORTAL

HOW TO LOGIN

The Agency Portal webpage can be found at https://unitedwayeo.smapply.ca/acc/l/ .

In order to avoid any internet browser issues, it is recommended that you use Google Chrome to access the Portal. We receive a significant amount of calls from users encountering problems when using other browsers.

Please note:

1. **Agencies that have previously submitted a proposal** in the past can access their account using the same login (email address) and password. If you have forgotten your password, you can easily reset it from the Agency Portal login page. Please do not create a new account. If you have not used the portal before, but your agency is already registered, you can request the primary administrator of the portal in your agency to add you to the agency's account.

2. If your organization has an existing account, kindly approach your primary organizational contact to include you in the account. For organizations unsure about possessing an account, please reach out to us at agencyinfo@unitedwayeo.ca

ADDING A NEW CONTACT

1. Login as an organization administrator
2. Click on **Manage Organization** in the top right corner
3. Click on **Members**
4. Click on **Add Member**
5. Enter the **First Name, Last Name,** and **Email Address** of the member
6. Select if they will have Administrative or Non-Administrative Access. Refer to What are the different Member Roles? for more information.
7. Optional: If you have teams created, click to add them to a team
8. Optional: Notify the user that you are adding them to the organization

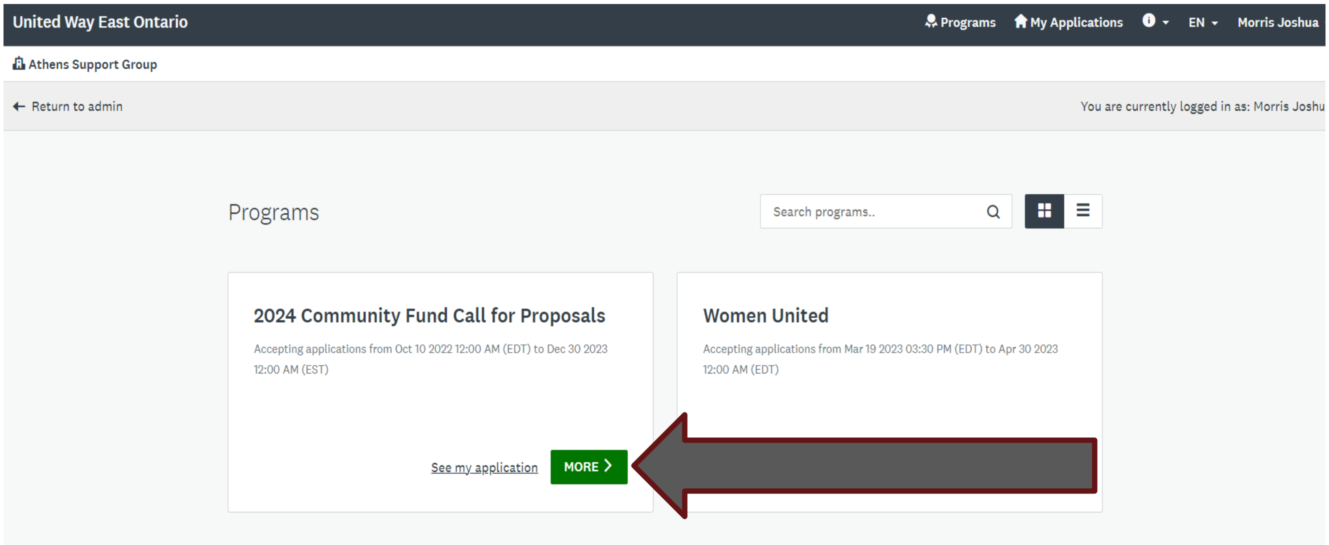
HOW TO CHANGE THE PRIMARY ADMINISTRATOR

If you are the Primary Administrator you have the option of transferring this access to another member of the organization:

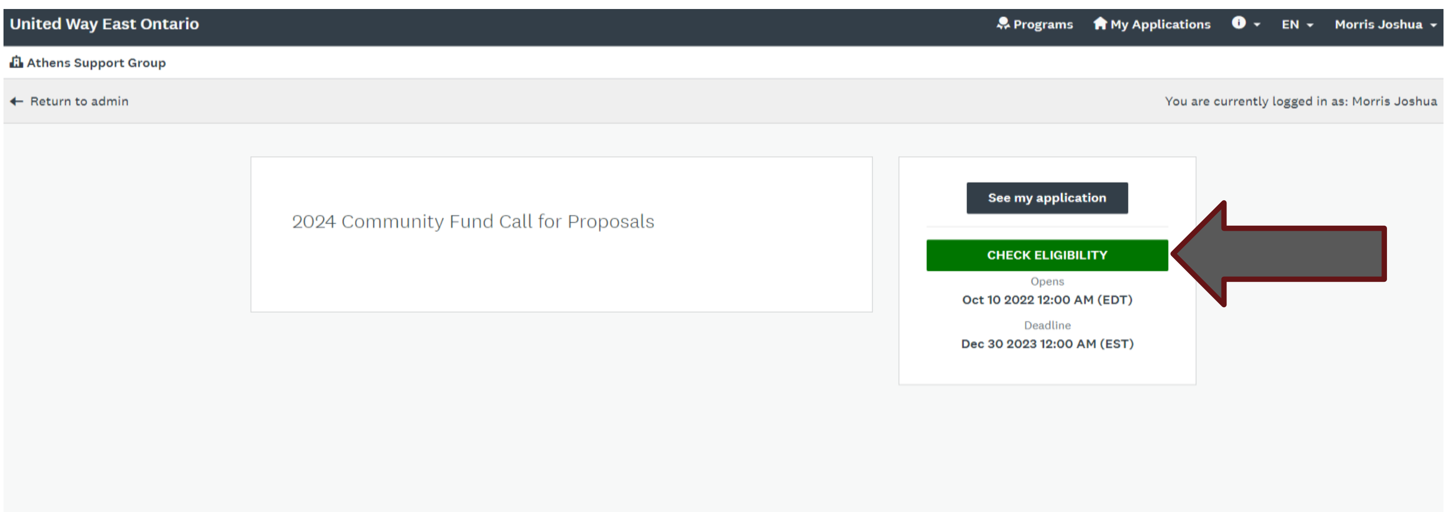
1. Login as an organization administrator
2. Click on **Manage Organization** in the top right corner
3. Click **Profile**
4. Click **Transfer Primary Administrator**
5. Select the new primary administrator
6. Click **Transfer.** You will be removed as the primary administrator of the organization and will be given Non-Administrative permissions to access the organization's applications.

CREATING AN APPLICATION

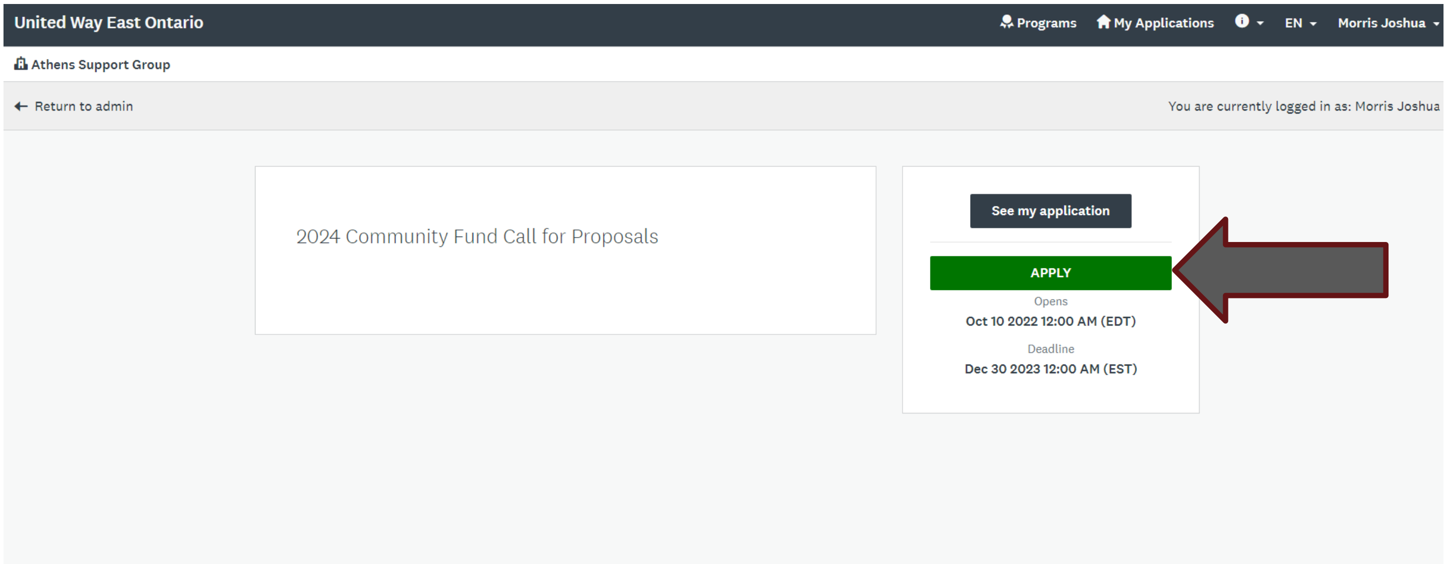
To create an application, click on **"More"** to access the eligibility check tab.



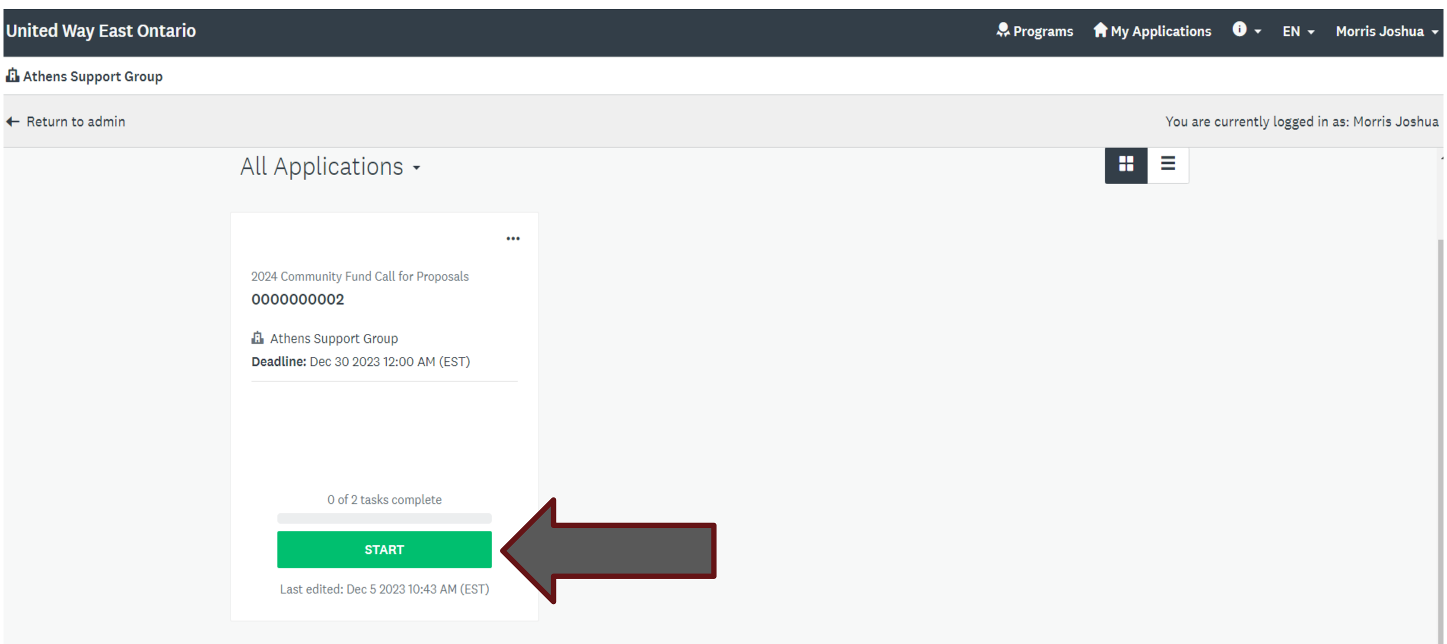
Once the next page, click on **"Check Eligibility"** to complete the pre-eligibility form.



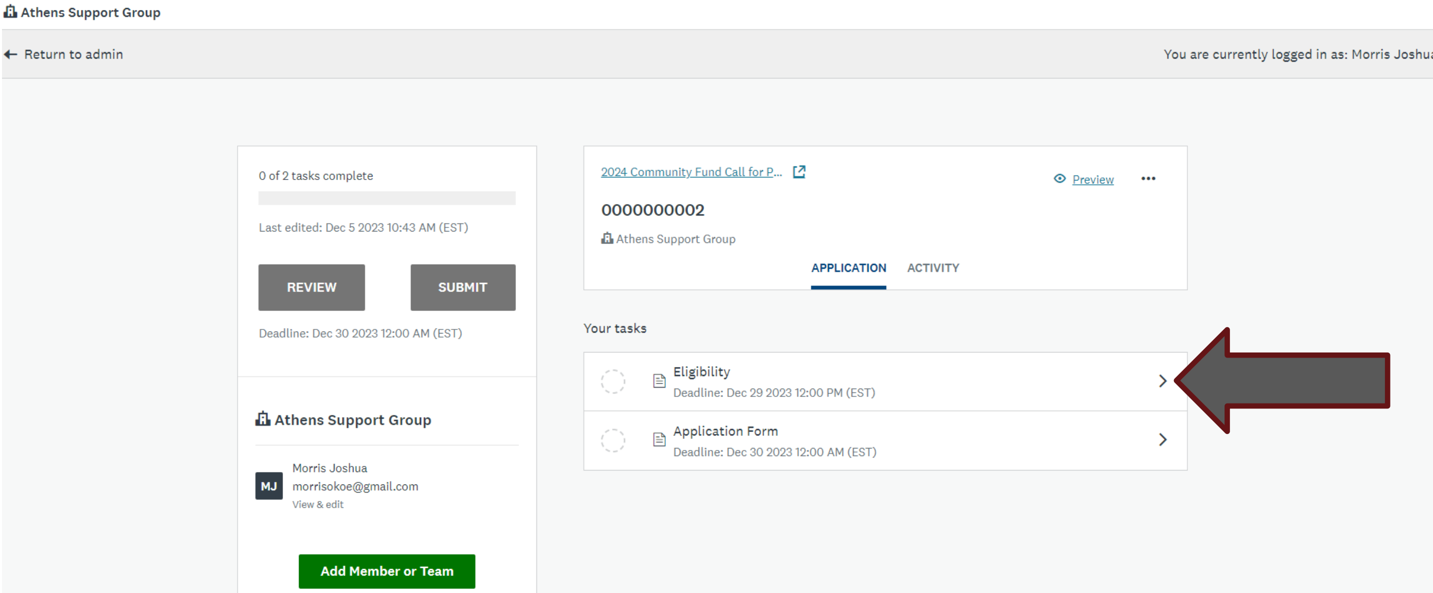
After completing the pre-eligibility form, you will see the **"APPLY"** tab which you will click on to commence the application.



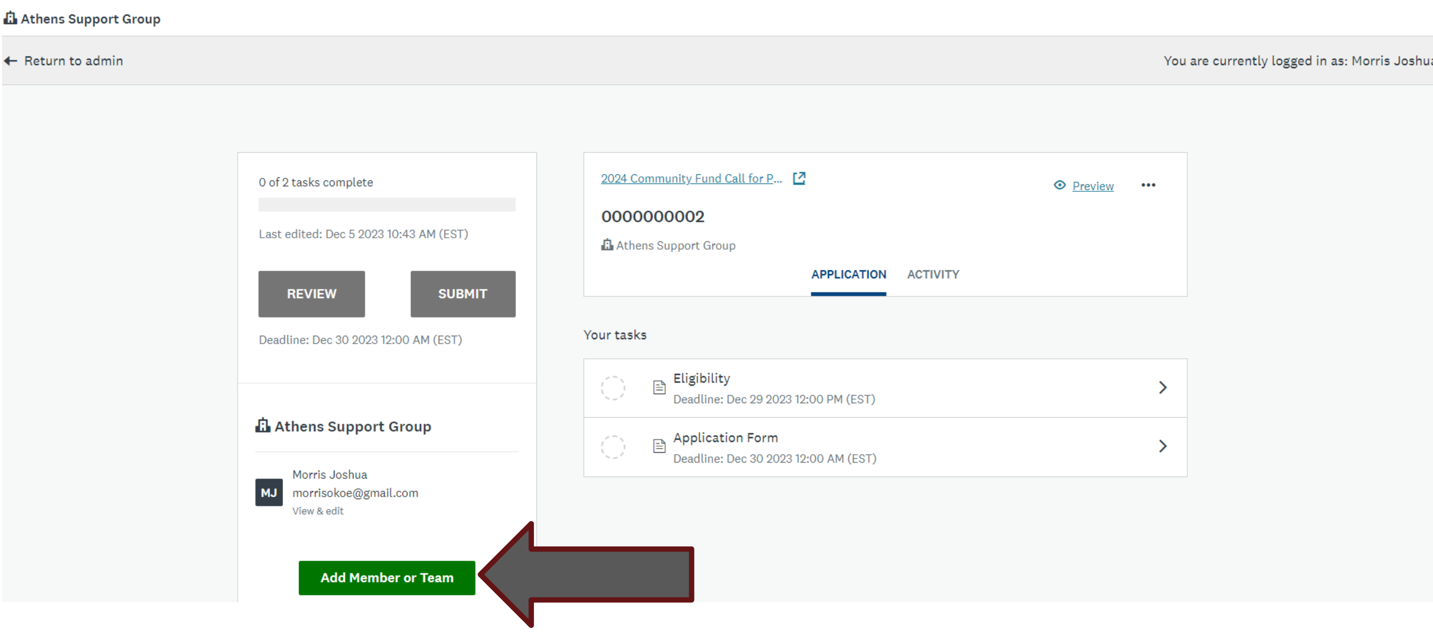
Once the application opens. Please click **"Start"** to fill in the eligibility form to determine if you need a sponsor and/or if you meet the eligibility requirements.



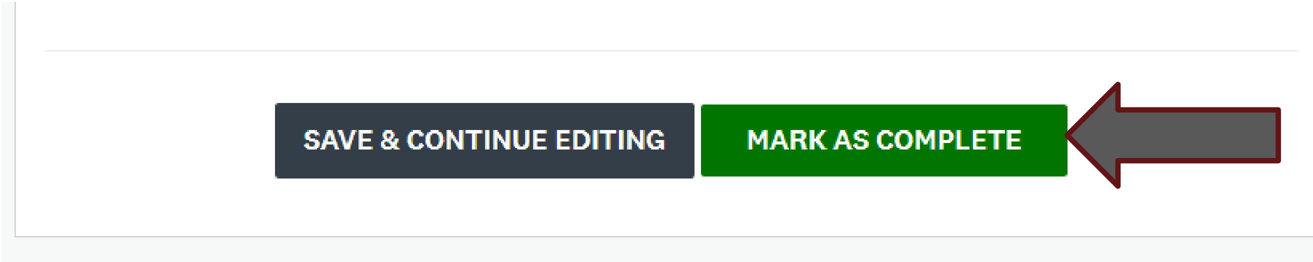
Please note that, once the application is opened, you will need to complete the **eligibility form** to confirm your eligibility and to confirm whether you will apply through a sponsor before completing the main application form. Failing to do that will result in an incomplete application or an application that does not meet the eligibility criteria. Ineligible or incomplete applications will not be considered for funding.



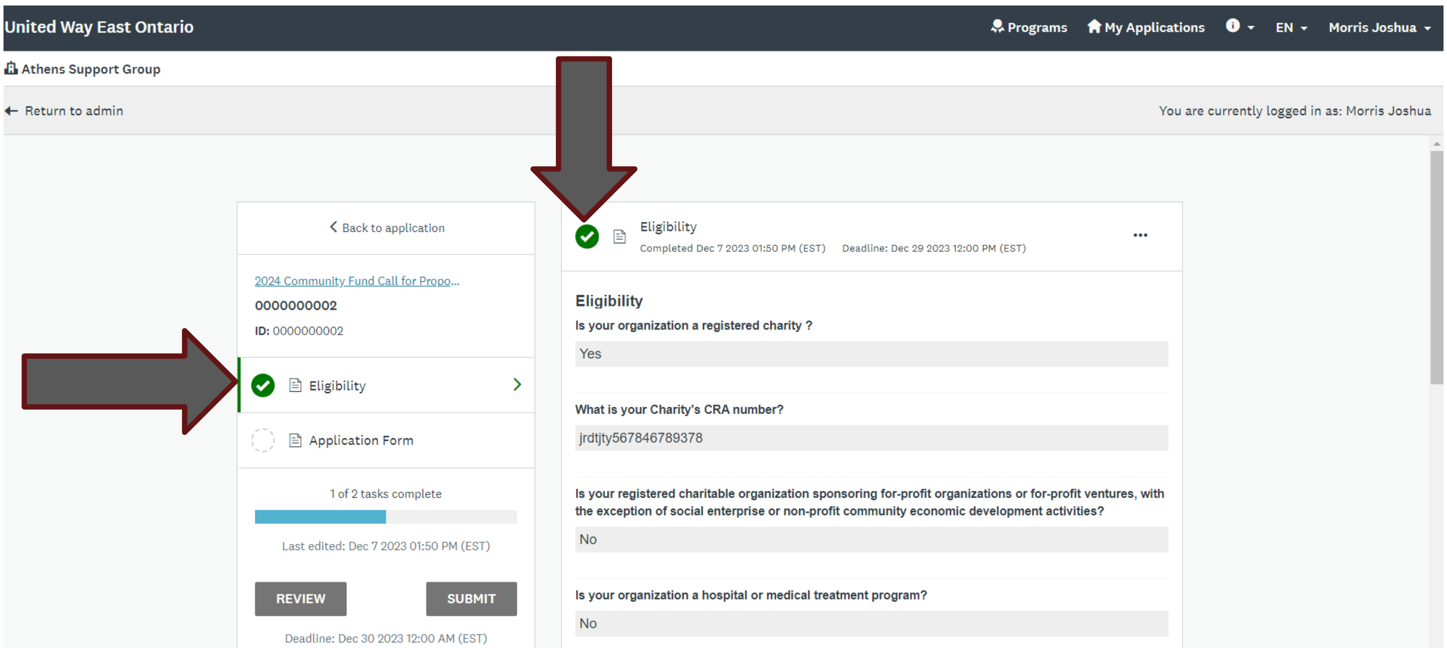
You also have the option to add other organizational members or team members to work on the application by clicking on "**Add Member or Team**".



Once the eligibility form is completed, you will be notified if you need to apply through a sponsor or if you do not meet the eligibility requirements. Click **"Mark as Complete"** to move to the main application form. Please do not submit an application if you receive a message stating "***Based on your responses, your organization is ineligible to apply. Please make sure your organization meets all the eligibility criteria before proceeding. If you have any questions, contact agencyinfo@unitedwayeo.ca.***" We advise you contact us at the email address provided if that message shows.



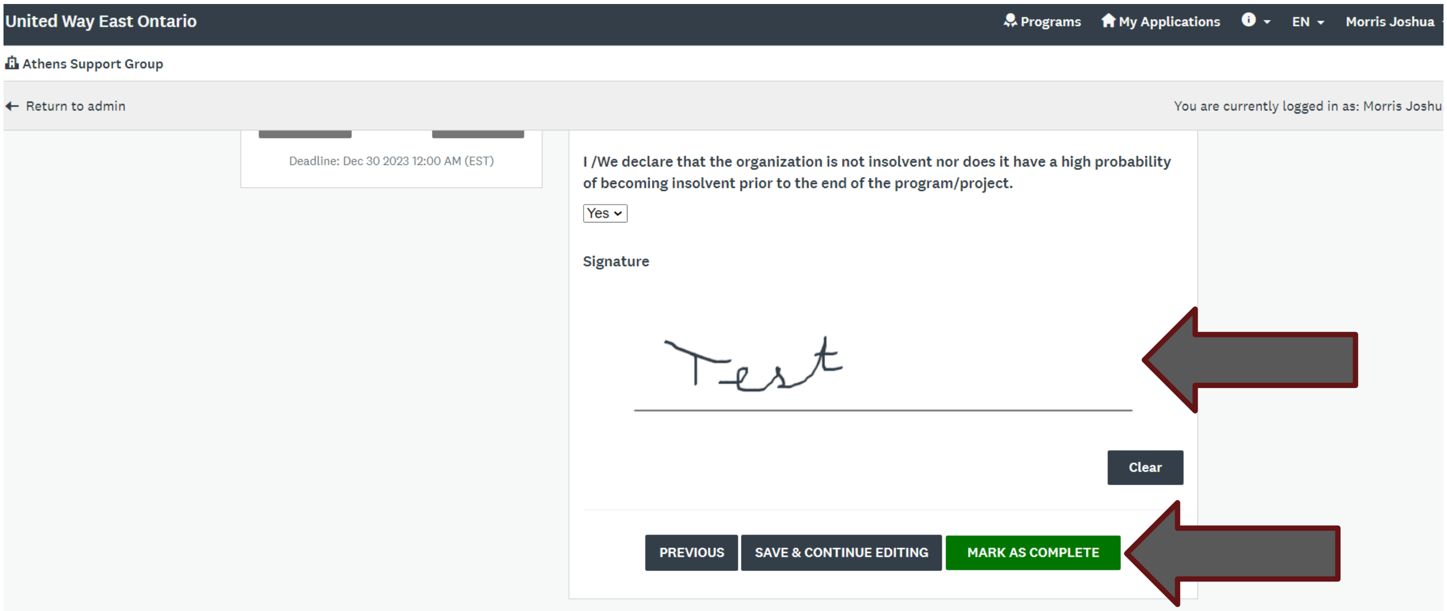
With the eligibility form completed, you will notice a white checkmark in a green circle indicating the task is complete. You can then proceed to the main application form.



Please be mindful of the word limits when completing the application. When a word limit is exceeded, the portal will not permit you to progress to the next tasks.

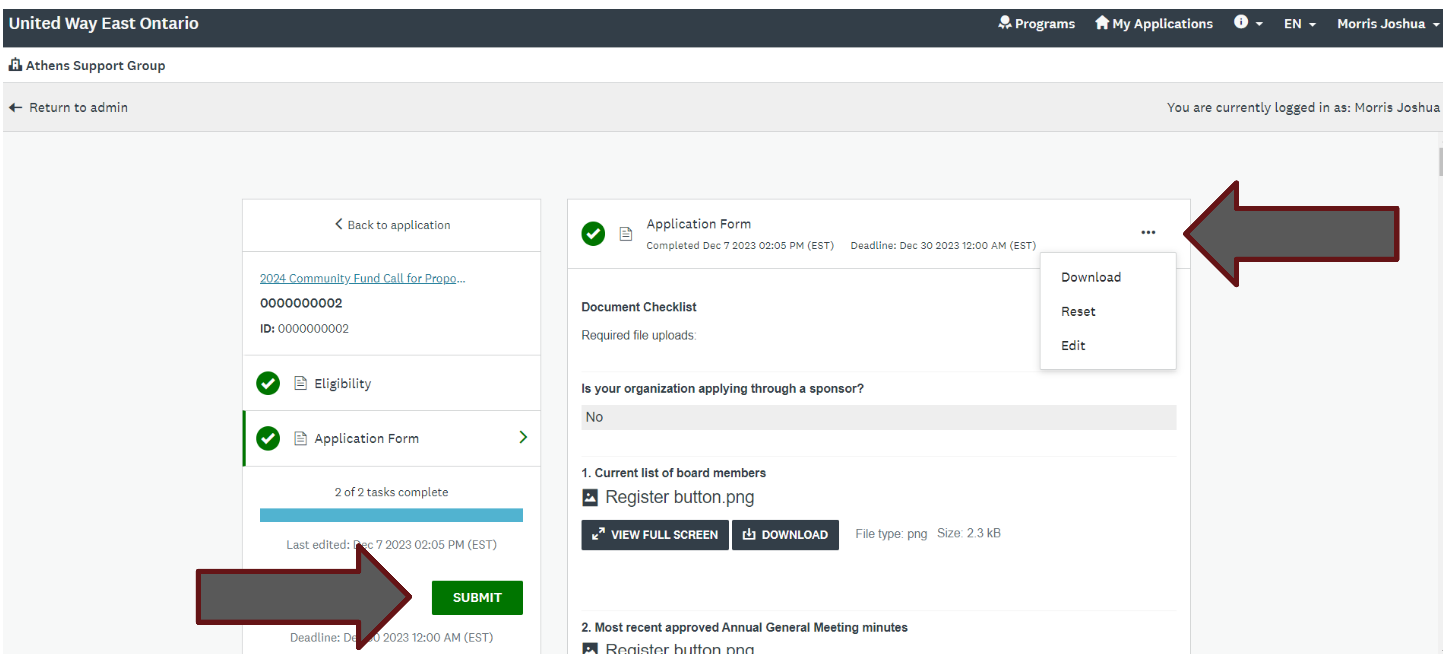
On the signature page, which is the last page of the application, please click on your mouse and draw your signature on the line as indicated in the image below.

After completing the signature, click on **"Mark as Complete"** to progress to the submission page.

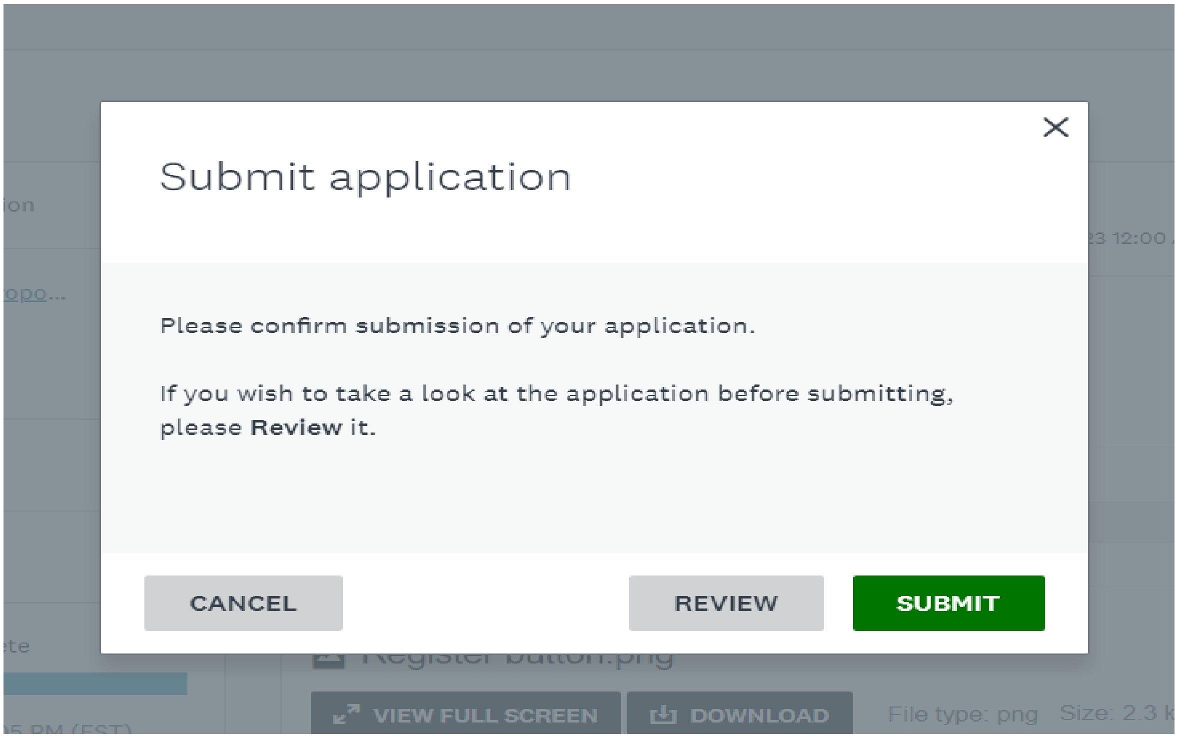


You can edit your application at any time before submission by clicking on the three dots indicated below. You will have the option to download, reset or edit the application. After submission, the same three dots can be used to download a copy of the application.

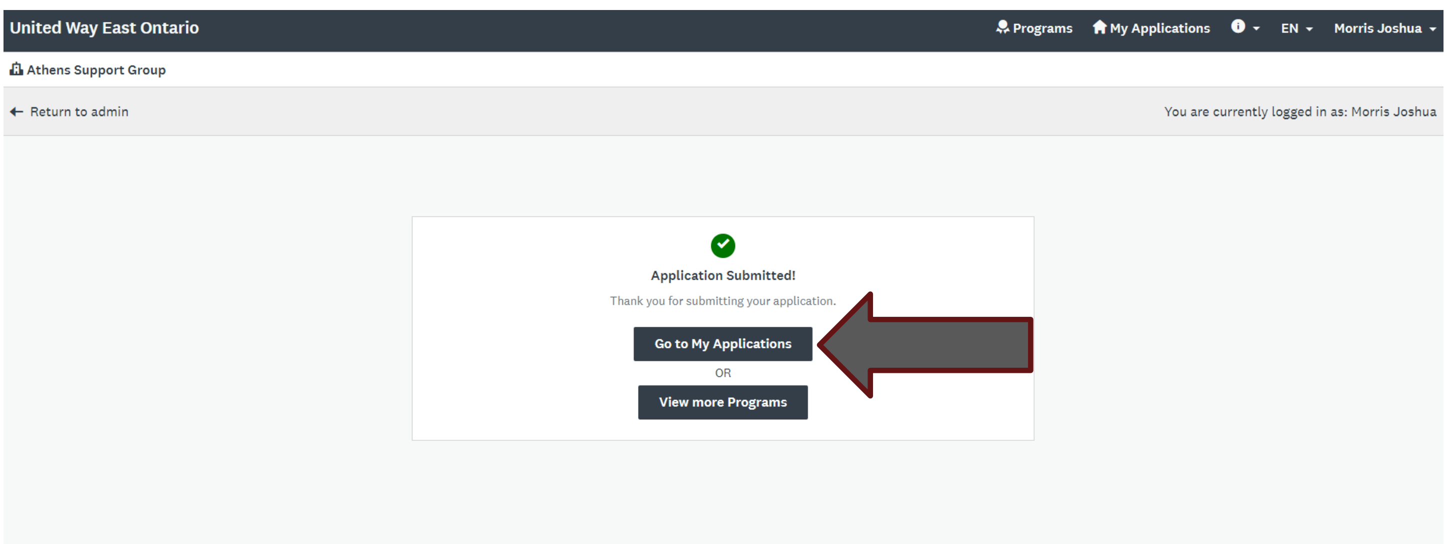
Click on Submit when you have done all checks to make sure the application is complete. **Please note that only the primary administrator of the organization's account can see and use the submit button.**



The image below will appear after clicking on "**submit"** as a reminder that the application is about to be submitted.



With the application submitted you will see the image below. To view your application, please click on **"Go to My Applications"** to view your submitted application.



PROPOSAL INSTRUCTIONS BY QUESTION

PARTNER SPONSORSHIP QUESTIONS:

Please respond Yes or No to each question to determine if you meet the General Eligibility criteria, which are the requirements for submitting a request without a Sponsor.

If it is determined that you do not meet the requirements, you will need to find a registered charity that will agree to enter a sponsorship relationship with you. Both your Agency and the Sponsoring Agency's Executive Directors and Board Chairs will need to sign the Sponsorship Authorization form. Please review the Partnering Sponsor Organization Accountabilities and Applicant Organization Accountabilities outlined in the form. Ensure the form is completed and signed by both parties and scanned as a PDF and uploaded into the **Document Checklist** of the applicant agency.

Other Eligibility Criteria and Applicants Ineligible for Funding: Please respond Yes or No to each Eligibility question to determine if you meet all eligibility criteria. If you do not meet Other Eligibility or are determined to be an Applicant Ineligible for Funding **then you may not apply**, even with a Sponsoring arrangement.

New as of February 8th, 2024:

For agencies requiring a sponsor, a new task will be created called "Request Sponsor Documents". In this task, you will be prompted to enter the name and email address of your contact person at the sponsoring agency. Your sponsor will then have access to the system to view your proposal and upload their relevant documents into your proposal.

DOCUMENT CHECKLIST

- Enter the date of your fiscal year end and the date of your last Annual General Meeting.

- Here you are asked to upload PDF versions of required documents. Instructions are provided to indicate, which documents are mandatory for the application process.

Required for application:

- Most recent audited financial statements* – They must be final and approved i.e. signed off by required signatories. Audited financial statements must be from your most recent fiscal year end unless your year end was within the past four months. If financial statements more recent than this date are not available an explanation must be provided. A lack of recent audited financial statements may affect the eligibility of your proposal or result in funding conditions if funded.

* Charities with revenues less than $250,000 may submit reviewed financial statements **only if** they have been funded by UWEO in any funding stream within the past 5 years (2018/19 – 2023) and are in good standing with the organization.

- Recent approved Annual General Meeting minutes (or partnering sponsor organization's Annual General Meeting minutes, if applicable). The Annual General Meeting minutes are normally from the **same fiscal year** as your audited or reviewed financial statements. If you have not yet approved those minutes because your AGM has not occurred yet, submit the approved minutes from the year previous.

- Current organizational budget (unaudited) – This should be the budget for your current fiscal year (unaudited).

- Proof of sufficient General liability insurance - Liability Insurance must be for **at least $2 million, clearly dated** and **current.** Do not submit expired insurance documents. The Liability Insurance must be valid at the time this application is being submitted. If the Liability Insurance submitted expires prior to July 1, 2024 and your program is selected for funding, you will be required to provide valid insurance for the start date of your funding agreement. We do not require United Way East Ontario to be named on the certificate of insurance.

See previous section for instructions regarding the Sponsorship Authorization form which is required for Agencies who do not meet all eligibility requirements.

Please note: incorrect, missing our outdated documents can affect the success of your Proposal. Take the time to ensure this section is completed correctly by the deadline.

APPLICATION FORM

STEP 2: Submit a Proposal to United Way

Enter a Program/Project Title and select the catchment area and strategic priority addressed by your program/project. Only the goals listed in the drop-down menu are accepting applications this year.

Please note that the goal and catchment selection controls visibility of questions related specifically to your choice. Please complete these fields before working on the proposal questions below.

There is no score, or assessment criteria associated with these questions.

SECTION A - ORGANIZATIONAL INFORMATION

A1. **Describe the organization's experience and success in delivering similar programs/projects. Provide evidence of specific results achieved with similar programs/projects. Note:** If the agency submitting is a sponsored agency, the response to this question should be about the **sponsored** agency, not the **sponsoring** agency. *Maximum response of 250 words.*

Criteria for Assessment

- How successfully is the agency delivering other programs/projects that it runs?
- Does the agency have a history of successful/unsuccessful programs/projects?
- Are the programs/projects similar (e.g. scope, scale, method, issue being addressed) to what is being proposed?
- Are the results provided specific and demonstrative of real/significant impact?

When discussing agency capacity, it is not enough to state that the program was a success, provide examples of key results that demonstrate success.

Examples of specificity would include: providing the actual percentage change in program/project outcomes, citing the number and extent that people were impacted, citing specific policy or systemic changes that are attributable to the program/project etc...

A2. **Describe the organization's (including management and staff) capacity to deliver the proposed program/project. Please state how your agency works to be representative of the equity seeking – equity deserving communities you serve. Note:** If the agency submitting is a sponsored agency, the response to this question should be about the **sponsored** agency, not the **sponsoring** agency. *Maximum response of 250 words.*

Criteria for Assessment

- Does the agency including management and staff, have the ability and capacity (i.e. experience implementing/managing similar program/projects, etc.) to deliver the proposed program/project?
- Is the agency representative of the equity seeking/equity deserving communities that they serve?

Provide details of staffing requirements for positions to be funded by the proposal

A3. **Provide a brief description of your organization's core mission and a brief history of the organization. Note:** If the agency submitting is a sponsored agency, the response to this question should be about the **sponsored** agency, not the **sponsoring** agency.

Criteria for Assessment

- Is the program/project consistent with the core mission of the applicant agency?
- Is there evidence of mission-drift?

You may reuse this description from previous years if it has not changed. If you are submitting multiple requests, we encourage you to use the same description in each request.

If the organization has several branches, make it clear how the structure relates to the proposal. E.g. Is the proposal submitted on behalf of one branch or all? Will it be implemented at one branch or several?

A4. **Is this program/project being delivered by a coalition of agencies?**

There is no score or assessment criteria associated with this question.

A4.a Please provide details about the coalition (e.g. lead agency, member agencies, roles etc…)

Criteria for Assessment

- Does Agency provide names of coalition members, indicate lead agency and describe roles of the respective agencies?
- Does the description provide clarity regarding what members bring to the coalition?

SECTION B – ALIGNMENT TO UNITED WAY OBJECTIVES

B1. Briefly explain how your program/project supports and will help to achieve the priority goal.

Criteria for Assessment

- Please refer to the description for the strategic priority in question.
- Evaluate the evidence provided to clearly show that the program/project supports and will help to achieve the strategic priority.

This question helps assessors to determine strength of alignment to the chosen strategic priority. Please review the strategic priorities description carefully to ensure you have chosen the best fit. We encourage the use of concrete evidence/past results and specific examples to make your case for supporting the strategic priority. Include reference(s) to substantiating research, past results, studies and/or focus group findings in your answer.

Refer to the strategies of the strategic priority and identify how you align. Do not leave room for interpretation. Ensure you have read the strategic priority description carefully. Most agencies applying are aligned to the goal, so often decisions come down to how closely aligned one proposal is over another.

B2. Is this proposal for a Social Enterprise project?

If Yes -
B3. Please describe how this proposal meets the social enterprise criteria outlined in the strategic priorities description.

B4. Are all participants of the Social Enterprise being paid minimum wage or greater?

If No –
B5. Please explain (including any piecework pay formulas)

Criteria for Assessment

- Does the description adequately outline how this program is a social enterprise?
  - Does the description adequately explain how this program leads to employment that adheres to Ontario Labour Standards.
  - If the strategic priority is related to employment the enterprise must also increase participant's opportunities to succeed in East Ontario's labour market, ensure dignity of choice, and foster an inclusive workplace and/or community
- If the participants are not being paid at least minimum wage, do piecework formulas result in an equivalent minimum wage or greater?

SECTION C – PROGRAM/PROJECT INFORMATION

C1. Is this application for a current or previous United Way funded program/project?

C1a. Please provide the most recent name of this program/project?

C1b.Please select the year (or years) that this program was funded from the drop-down menu.

There is no score or assessment criteria associated with this question.

If you are entering the name of your previous or current program or project please make sure that you use the exact wording as the program or project was submitted to United Way. Please refer to your Funding Agreement.

Select the United Way funding year, not your agency's operating year. Select the most recent year it was funded. You may select additional years if it was funded for more than the most recent years.

C2. Complete the table by describing key partnerships (formal or otherwise) currently in place and/or, new partnerships you will seek to develop during the program/project.

Describe formal or non-formal key partnerships in place and/or, new planned partnerships and your relationship with other similar programs. Be careful to differentiate between current and future partnerships and provide partner names and roles.

Please complete each column of the table.

Criteria for Assessment

- Partnerships can be either informal (i.e. in-kind support, sharing of information, assistance with the evaluation process, etc) or formal (i.e. signed partnership agreements, formal collaboration, etc).
- Is the applicant agency working in partnership with other organizations to implement this program/project?
- Have partner names been provided and roles defined?
- Has the nature of the partnership been defined?
- Has the funding or in-kind contribution been described?

Your response should go beyond a list of partners; explain the nature of your partnerships--how do you work together? Do you have MoUs? An agency to which you refer clients on occasion would not be considered a partner. It is more useful to detail key partnerships then to list more partners with no details.

C3. Is this a collective impact model based program/project? See '?' for a definition

Review the Collective Impact definition and conditions below and respond 'yes' or 'no' depending on whether you meet the definition and conditions. Please note that if you respond 'yes', you will be asked to show, which conditions you meet, to what extent and to explain how you meet those conditions.

Read the Collective Impact definition carefully before responding to this question. Do not respond yes to this question unless your proposal really fits; collaboration, partnerships and networks alone are not Collective Impact.

Collective Impact:
Collective Impact is an approach that should not be confused with the broader term of community impact or other forms of collaboration and partnership. Organizations have attempted to solve social problems

through collaboration for decades without producing many results. The vast majority of these efforts lack the elements of success that enable collective impact initiatives to achieve a sustained alignment of efforts.

There are five distinct conditions needed in a true Collective Impact model. These conditions must be in place to be considered a Collective Impact model:

I. **Common Agenda -** a shared vision for change including a common understanding of what the problem is and a joint approach to solving it through agreed upon actions.
II. **Shared Measurement -** Collecting data and measuring results consistently across all activities ensures efforts remain aligned and the partners hold each other accountable**.**
III. **Mutually Reinforcing Activities** – Strategies and activities must be differentiated while still being coordinated through a mutually reinforcing plan of action. There is no space for duplication.
IV. **Continuous Communication** - Consistent and open communication is needed across the many players including agencies and funders to build trust, assure mutual objectives, and create common motivation.
V. **Backbone Organization Support –** Creating and managing collective impact requires separate organization(s) with resources and specific skill sets to serve as the backbone for the entire initiative and play a key coordination role with organizations, agencies and funders.

C3a. Select which of the following conditions already exist.

Only necessary for agencies with a Collective Impact model based program/project

C3b For each selected condition, indicate what percentage of achievement you believe is in place; and

C3c. Please provide evidence of how you meet each of the five conditions stated above and provide justification for selected achievement percentages

Criteria for Assessment

- To what extent does this program/project adhere to a collective impact model?
- How far along is this agency in satisfying the five conditions?
- Is the evidence of the five conditions being met clear and convincing?
- Is there satisfactory justification for the achievement percentages?

C4. Where will your program be offered? Please input your service location sites, not locations where your clients live.

Criteria for Assessment

- Will the program be delivered in multiple geographic locations?
- Is the program/project targeting a geographic area/neighbourhood that has large populations of individuals from vulnerable populations?
- Are there other programs/projects in the same geographic area offering the same, or highly similar services?
- If duplication exists, is that duplication necessary to fill a gap in service?
- The answer will allow UWEO to ensure that resources are invested efficiently and effectively.

C5. If this program is a backbone support for a collective impact initiative or a program from an initiative member delivering one of the mutually reinforcing activities, you may be eligible for a

multi-year agreement. If you are interested in a multi-year agreement please indicate how many years.

Only respond if this applies to your situation. There is no score or assessment criteria associated with this question.

SECTION D – IMPLEMENTATION

D1. Describe the specific need(s) within the priority goal that your program is addressing and how United Way funding would impact the target population. Make sure to include the populations served by your program.

Criteria for Assessment

- Does the description go beyond the strategic priority description to explain the specific need being addressed?
- Is there a clear description of who the specific target population is and how they would be impacted by the program/project?
- Is there a causal link between the described impact and the need?
- Is the impact realistic considering the scope of the project?

Your response to this question allows assessors to determine Greatest Need, Greatest Impact, which is the promise United Way seeks to fulfill when making funding investments.

Be sure to elucidate precisely what will be done with United Way funds if the application is for a program funded by multiple sources.

It's important to go beyond saying that your population is the hardest to serve or the most vulnerable as it is something that most applicants write.

D1a. What are the equity seeking populations your program aims to reach (choose up to 3)

Criteria for Assessment

- Does the program/project serve equity seeking/equity deserving groups?

D2. Provide a description of your program/project and its intended goal. This should be your 'elevator pitch', the headlines of your program that you would describe if you only had thirty seconds to make someone understand your program.

Criteria for Assessment

- Is the goal of the program/project clearly stated?
- Is there a clear link between the stated activities (in D3) and the ultimate goal?
- Are there unrealistic expectations?

D3. Describe your planned activities. For each activity describe what you will do, the specific population you are targeting, where the activity will take place, and when and how frequently you will be doing it.

Criteria for Assessment

• Is there a clear link between the stated activities and the ultimate goal (in D2)?

• Is the 'what, who, when, where and how' explained?

• Will the activities presented result in the achievement of the stated results?

• Are the activities reasonable? Are there unrealistic expectations?

Key activities should not be repetitive of your responses regarding alignment to the strategic priority. Inclusion of activities that are not directly related to the strategic priority can detract from the main purpose of the program. If you do decide to include activities not directly related to the strategic priority, it is important to give the reader an idea of the scope /significance of those activities vis a vis ones that are more closely aligned.

D4. (Optional). Any pertinent information you would like to add? Please only use this space to provide information unrelated to questions asked in the Request for Investment. This is not intended as space to expand on responses to existing questions..

There is no score or assessment criteria associated with this question.

SECTION E – EVIDENCE-BASED APPROACH AND EVALUATION PLAN

E1. Will this program work directly with clients or beneficiaries?

There is no score or assessment criteria associated with this question.

E1a. Indicate the total number of unique individuals that you expect to serve in a 12 month period.

There is no score or assessment criteria associated with this question.

Care should be taken to avoid double counting individuals who are served more than once during the year or are impacted by more than one program element. Do not double count participants (we want to know your total clients not total visits).

E.g. if you expect to train 30 individuals and at the second training 10 of the original participants also attended along with 20 new participants then your number of people served would be 50 rather than 60.

This number will be reported annually in your program report.

E2. Please demonstrate how the proposed activities and results are backed by evidence-based/evidence-informed research (both internal and/or external research is valid).

Criteria for Assessment

• Is the relationship between the proposed activities and the anticipated results evidence-informed?

• How well is the relationship articulated?

• Evidence can take the form of internal research or external research.

• Is the evidence presented relevant?

Make sure the research is relevant and ideally local.

INDICATORS AND DATA COLLECTION

In this section you will describe the anticipated performance of your project/program using indicators and targets within a Results Based Accountability model.

An *indicator* provides evidence that certain results have or have not been achieved. You will be asked to report on these same indicators in your program report. Projects/programs are expected to achieve program/project level, rather than population-level performance results.

Indicators should meet the following criteria:

• Direct: Measure as closely as possible the relevant result.
• Objective: Be precise and unambiguous about what is being measured and how. There should be no doubt on how to measure or interpret the indicator.
• Adequate: Should sufficiently capture all of the result.
• Practical: quality data needed to inform the indicator are available in the given time-frame.

Output Indicators:

Measure the quantity and quality of services provided (e.g. clients served, hours of service, activities that took place, sessions held, pamphlets produced, etc.). <u>In other words, Outputs measure how much you did and how well you did it.</u>

Outcome Indicators:

Measure the broader results achieved through provision of services, in this case at the program or project level. Outcomes quantify the actual effect the agency's efforts have on its objectives. For agencies who deal with clients, outcomes could be changes in (or maintenance of) skills, knowledge, attitudes, behaviour or circumstance. For agencies who work at a system level, outcomes could be changes in (or the maintenance of) system level states, conditions, policies, etc. <u>In other words, Outcomes measure if anyone is better off, or in the case of system level programs, whether or not the key desired goal has occurred.</u>

Program reporting:

Should this program be funded - With any indicators that have percentage as the unit of measure, in the annual program report, we will ask for the calculation (e.g. numerator and denominator) used to determine your result.

In addition, if you receive one year of funding for a new or modified program, we will ask for a 6 month progress report in January of your first year. This report will be used to help assess whether your program should receive funding for a second year should you reapply. It is advisable therefore to have one or more indicators that you can report on at the six month report, instead of only indicators that can be measured once per year. The 6 month progress report will ask for results on indicators and a short narrative explanation of activities and results thus far.

Instructions on indicators differ depending on which goal you have selected. Refer to the relevant section below:

E3. The first 5 indicators in the table are common indicators for all programs funded under your strategic priority. If you are doing work that supports the achievement of these indicators please complete the blank columns for the relevant indicator and provide any additional information noted. In the lower part of the table there is space for you to enter up to 5 other indicators. You may create your own or select existing standardized indicators from the drop boxes.

Common Indicators

If you are doing work that supports the achievement of these indicators please complete the blank columns for the relevant indicator and provide any additional information noted.

Standardized Indicators

You may provide 5 indicators in addition to the common indicators (for a maximum total of 10 indicators). These indicators can be standardized or custom or a combination of both. If you have chosen to use standardized indicators, choose your Indicator in the Indicator Description column and then in each pre-populated column select the corresponding number to populate the correct information. It is important that you select the same number in each column. E.g. If you select Indicator Description 2 in the description column than you must also select 2 in the Type, unit of measure and definition columns. Complete any blank columns.

Custom Indicators

You may provide 5 indicators in addition to the common indicators (for a maximum total of 10 indicators). These indicators can be standardized or custom or a combination of both. If your work does not align with any of the common indicators and you have not selected any standardized outcome indicators, you must provide at minimum one custom outcome indicator.

The definition of each column is provided at the bottom of the indicator window. Each numbered definition corresponds to a number indicated in the table header row, for instance: Type (1), Indicator Description (2) etc… Example indicators are also provided.

For all goals: More than 10 total indicators will not be accepted.

Completing the Indicator table – Definitions for each column in the table:

1. Type: Output or Outcome
2. Indicator Description: This is where you provide the actual indicator. The description should be succinct and without ambiguity. An outcome indicator normally implies directional change using words such as increase, decrease, strengthening, reduce, improved etc... An output indicator typically reports on short-term results or actions that are needed in order to achieve an outcome and uses action words such as trained, completed, identified, held, disseminated, evaluated, launched etc...
3. Target: Targets should be specific, realistic and ambitious. With few exceptions targets should be numeric. They cannot be a range (e.g. 45-55 is not acceptable, 50 is acceptable). There is no need to qualify a target (e.g. 50 children) because who or what the agency is measuring should be very clear in the indicator description (e.g. increase in children attending homework clubs).
4. Indicate Target increase %: If you are eligible and are requesting a multi-year agreement, you may wish to increase some or all of your targets for indicators past year 1. If you want to do this indicate the % you would like your target to increase by. E.g. if your target is 50 and in year two you want it to be 60 and in year three 72 then your increase is 20%. This is optional.
5. Unit of Measure: The most common units of measure will be number or percentage. For activities such as getting a policy approved or holding a major event, a unit of measure such as complete/incomplete may be more appropriate.
6. Definition: This is an opportunity to outline what the different terms/words used in the indicator mean to the agency, as often terms used are open to interpretation. For instance, in the indicator "decrease in the number of people using drugs", it would be helpful to further define that 'people' are program clients and to be counted as someone no longer using drugs, they must have been off drugs for at least 6 weeks by the end of the one year program.
7. Frequency and timing of data collection: How often and when data is collected. Daily, weekly, monthly, quarterly, Each January and July, annually etc… Is there a specific time period when data is collected (e.g. only during the school year, during tax season)?
8. Method to data collection or calculation: Describe the approach or plan to collect the data, including where data will be kept, how results will be calculated. Think through the steps to calculate the necessary figure or determine the result, this will help to ensure your indicator is realistic and appropriate and measureable.
9. Data Source: where the data needed to calculate or track the indicator will be coming from. It should be clear whether the source is internal to the organization or external. If you were asked to provide evidence of the figures you calculated or provided for your indicator, what documentation or source would you provide?
10. Person(s) responsible for data collection: When designing an indicator it is important to think about who will be responsible for collecting and maintaining the data, to ensure that it will be feasible to collect. Is this a staff member? A consultant? A volunteer? Identify the title of the person responsible.

Custom Indicator Development Tips:

- Involve appropriate staff in indicator development (e.g. people who would be implementing the program, reporting on results).
- Indicators are not meant to be only extractive, they should be helpful to your agency and not only United Way
- Indicators must be able to stand alone without accompanying explanation. Would someone unfamiliar with your program understand your indicators?

- The ideal number of indicators for each program depends on size and scope and complexity of program activities.
- How to decide which of your many indicators to include in your proposal?
    - Limit indicators to the most important and telling indicators. Prioritize your ‘headline’ indicators (the ones you would use in a speech or news article).
    - If you have to prioritize, select the indicator that shows the most about how you are progressing towards your ultimate goal.

    Example – Indicators for an employment program in order of priority from LOWEST to HIGHEST

    1. Clients assessed at intake
    2. Clients receiving resume writing training
    3. Clients with updated resumes
    4. Clients receiving one or more interviews
    5. Clients served who obtain employment
- Ideally indicators should measure only one change. It is difficult to calculate and justify indicators that measure more than one change at a time. Since both changes would have to provide a positive result in order to count toward your indicator result, your combined result would be lower than if you measured the two changes separately.

  Indicator Description Example:

    - ~~Increased homework completion/school engagement~~ ***(target: 50%)***
    - Increased homework completion (target 50%)✓
    - Increased school engagement (target 50%) ✓
- Indicators that measure work processes are not as telling as indicators that show how much you have done, how well you did it or if anyone is better off.

    Examples of work process indicators: (e.g. emails sent, hours spent working on a task)
- You will report on your indicators afterward, so past is more appropriate than future tense.

  Indicator Description Example:

    - ~~Clients will be trained on small business practices~~
    - Clients trained on small business practices ✓
- Indicator description should not read like a survey response, the description of how the indicator will be derived or calculated should be noted in the method of calculation field.

  Indicator Description Example:

- ~~Clients responding Agree or strongly agree when asked if they feel their self-confidence has improved.~~
- Clients with increased self-confidence. ✓

- The subject of the indicator should be apparent

  Indicator Description Examples:

  1. ~~Volunteers~~

     Seniors' Recreation Program Volunteers ✓
  2. ~~Improved Self-Esteem~~

     Students have Improved Self-Esteem ✓

- Targets should be numeric. You may have a different target for each year or maintain the same target for one or more years.
- Outputs: Clearly distinguish unique clients from client visits/contacts.
- Outcomes: Satisfaction is not a client outcome, rather it speaks to how well you did, which is an output. The more specific the outcome indicator, the better.
- Specify whether evaluation tools are in house or standardized.
- A few quality outcome indicators is preferable to a long list of output indicators.
- Multiple indicators that essentially measure the same process or activity is not desirable.
- Make sure you have thought through how the indicator will be measured and whether it is feasible given timelines, human and financial resources.
- Complete all columns (exception – Indicate Target increase % for subsequent years (optional and for multi-year agreements only) – e.g. if This column is optional and only for agencies applying for collective impact multi-year agreements.
- Avoid repetition of information in multiple columns
- Avoid – 'same as above' etc. - Indicators will be exported from database and sorted
- Check calculations/numbers for consistency

E4. If you have determined that one or more of the common indicators does not align with your work or you are unable to measure, please provide your rationale.

Assessment Criteria:

If the agency is not reporting on common indicators is the explanation satisfactory and provide assurances that this agency can still provide strong results that are aligned with the desired outcomes of the goal

SECTION F – ANNUAL PROGRAM/PROJECT BUDGET

- Provide a one year budget for the entire program/project (including revenue not provided by United Way). This should be your program/project budget, not your agency budget.
- The amount of your request to United Way East Ontario is the difference between Revenue from other sources and the total amount of your program budget.
- If this is an existing program, the budget must be for your proposed program, not for the program as it exists currently.
- For Multi-year agreements: Funding awarded will be for the same amount (based on this one-year budget) each year of your program/project (depending on campaign results) for the length of the awarded agreement.
- The one year budget should include **all** in-kind contributions (revenues and expenses). Indicate your in-kind support in the revenue section and the equivalent cost in the expense section. For instance, if you report in-kind revenue of 400 volunteer hours' worth $6000 and rent and equipment worth $30,000 then you should also report the equivalent in expenses. The $6000 would be reported under salaries and benefits expenses and $30,000 in rent and equipment would be reported under Administration expenses. Be sure to distinguish between in-kind and cash costs in your budget note fields.
- Budget notes are **required** for **every** completed line of the budget for both revenue and expense lines. Use the Budget notes fields to describe what costs will be covered in that particular budget line, highlighting specific cost breakdowns for larger items (salaries etc…). Notes should also describe the portion of in-kind versus cash, if in-kind is included in that budget line. For revenue lines, indicate grant/agreement funding start and end dates if applicable. A lack of budget notes can greatly impact funding decisions. Make sure that different funder contributions are clearly differentiated in your budget notes.

Assessors will take into consideration funding amounts requested by agencies versus projected funding envelopes for each Strategic priority during the funding process.

F1. Complete your annual program/project budget

F2. Please describe how you will use the money from United Way.

Criteria for Assessment

Program/project has diverse funding sources (financial and in-kind)

- What proportion of the program/project budget is being requested from United Way East Ontario?
- Is there a heavy reliance on United Way East Ontario (or any other single funder) to run the program?
- Is the program sustainable?

Expenses are comprehensive and realistic

- Does the proposal include all expenses related to the program/project?
- Are there any major expenditures that should be listed, but are not?

•Are the expenses realistic? i.e. Are they true reflections of the cost associated with each line item?

• Are budget notes present and sufficiently detailed?

• Are in-kind costs included?

Cost Efficiency

• Are the costs reasonable given the individuals being assisted?

• Are costs reasonable given the depth and resources needed for the intervention?

• Are the costs reasonable given the numbers of clients being assisted?

• Please keep in mind that geographic area, types of clients, types of services provided can all have an impact on cost efficiency (i.e. similar programs offered in different geographic areas can have widely different costs depending on volunteer engagement, availability of other neighbourhood supports, etc)

ACKNOWLEDGEMENT AND SIGNATURES

Please note that references are no longer required.

United Way East Ontario is no longer accepting hard copies of documents. **Please keep the original signature page on file, should it be requested at a later date.**

All agencies are required to submit a signature page.

GLOSSARY

Administration Expenses:

Expenses including rent, insurance, office supplies, fax/phone, internet, accounting and legal fees, postage/courier etc...

Coalition: an alliance of agencies/organizations for a common action or purpose

Collective Impact: An approach that should not be confused with the broader term of community impact or other forms of collaboration and partnership. Organizations have attempted to solve social problems through collaboration for decades without producing many results. The vast majority of these efforts lack the elements of success that enable collective impact initiatives to achieve a sustained alignment of efforts.

There are five distinct conditions needed in a true Collective Impact model. These conditions must be in place to be considered a Collective Impact model:

- **I.** Common Agenda **-** a shared vision for change including a common understanding of what the problem is and a joint approach to solving it through agreed upon actions.
- **II.** Shared Measurement **-** Collecting data and measuring results consistently across all activities ensures efforts remain aligned and the partners hold each other accountable**.**
- **III.** Mutually Reinforcing Activities – Strategies and activities must be differentiated while still being coordinated through a mutually reinforcing plan of action. There is no space for duplication.

IV. Continuous Communication - Consistent and open communication is needed across the many players including agencies and funders to build trust, assure mutual objectives, and create common motivation.

V. Backbone Organization Support – Creating and managing collective impact requires separate organization(s) with resources and specific skill sets to serve as the backbone for the entire initiative and play a key coordination role with organizations, agencies and funders.

Community Impact:

Investments to influence community change (programs that benefit broader community, convening, research and speaking out).

Common Indicators:

Indicators that all programs under a strategic priority are asked to report on if their work aligns to the result being measured.

Convening and Engagement:

Convening and engagement are dynamic processes which engage a collaborative network of stakeholders who work together on behalf of their community to address an issue with the goal of creating and realizing community learning and change.

Direct Impact:

Investments in frontline programs and services that benefit individuals.

Evaluation Expenses:

Expenses required to conduct program evaluations, baseline and endline surveys, mid-term evaluations, operational research etc… Excluding transport and staff time which is counted elsewhere.

Evidence based research/support:

Evidence based research or support can take the form of published research or data, past program/project results, surveys, focus group results etc. that validates the relationship between the program activities, strategic priority(s), and intended results.

Financial Solvency:

Financial solvency, in an organizational context, is the ability of the organization to fulfill its financial commitments.

Focus Areas:

Focus areas provide the overall framework within which United Way East Ontario will apply its efforts and investments in the community. Within each focus area are specific strategic priorities that further define how United Way will make resourcing decisions and engage the community. There are three focus areas:

- **All That Kids Can Be:** To help kids in East Ontario grow up to be their very best we invest in initiatives that will prepare them for kindergarten, give them a safe place to go after school to play, learn and just be a kid, and programs that get homeless youth off the streets for good.
- **Health People, Strong Communities:** United Way ensures that all members of our community get the help they need, when they need it.
- **From Poverty to Possibility:** We invest in programs and initiatives that help immigrants find jobs that match their skills and give people with disabilities employment opportunities and a sense of belonging to their community**.**

Funding Categories:

There are four categories of investment opportunity for each of the strategic priorities. Combined, they represent a holistic approach to realizing the Strategic Priorities. They include:

1. Programs and services
2. Convening and engagement
3. Policy and advocacy
4. Research

Funding for Results:

Funding for results refers to a funding strategy where there is a very deliberate relationship between the funding provided to a service provider and the results achieved; i.e. funds are "paid" to a service delivery partner for agreed upon results in a specified timeframe. These results can be expressed as either outputs or outcomes, for example the number of clients served, the number of clients that progressed from "x" state to "y" state, a specific piece of primary research, a policy change etc.

Indicator: An indicator provides evidence that certain results have or have not been achieved. Indicators should meet the following criteria:

- Direct: Measure as closely as possible the relevant result.
- Objective: Be precise and unambiguous about what is being measured and how. There should be no doubt on how to measure or interpret the indicator.
- Adequate: Should sufficiently capture all of the result.
- Practical: quality data needed to inform the indicator are available in the given time-frame.

In-Kind Contributions:

In-kind contributions are goods or services that your organization would otherwise need to purchase that are provided, free of charge, by other organizations/individuals. The value of in-kind contributions should be based on what you would have paid for the goods and services, if you had to purchase them. In-kind contributions help demonstrate the true costs associated with running the program/project.

Examples of in-kind contributions include, but are not limited to:

- Volunteer hours (# of hours worked x $15 per hour)
- Donated professional services (such as legal advice, auditing of financial statements)
- Overhead (such as utilities) related to the program/project
- Donated equipment, materials, office supplies
- Rent-free use of facilities, office space or equipment
- Donated publication, printing and promotional materials

Miscellaneous Expenses:

Expenses that don't fit in any other expense category. Such expenses must be explained in detail in the budget description and comments.

Outcome Indicators:

Measure the broader results achieved through provision of services, in this case at the program/or project level. Outcomes quantify the actual effect the agency's efforts have on its objectives. For agencies who deal with clients, outcomes could be changes in (or maintenance of) skills, knowledge, attitudes, behaviour or circumstance. For agencies who work at a system level, outcomes could be changes in (or the maintenance of) system level states, conditions, policies, etc. In other words, Outcomes measure if anyone is better off, or in the case of system level programs, whether or not the key desired goal has occurred.

Output Indicators:

Measure the quantity and quality of services provided (e.g. clients served, hours of service, activities that took place, sessions held, pamphlets produced, etc.). In other words, Outputs measure how much you did and how well you did it.

Policy and Advocacy:

Policy and advocacy activities are designed to increase the community's understanding of the importance of an issue and/or the need to address policies and strategies to change, reduce or remove barriers. Advocacy can include a wide range of activities that an organization undertakes including media campaigns, public speaking, educational seminars, lobbying for policy changes etc.

Program Costs Expenses:

Program-related expenses such as materials, resources and promotion. This excludes transport.

Programs and Services:

Program and services cover activities designed to provide vulnerable clients with supports including but not limited to basic day to day living essentials, training, education, skills development, mentorship, engagement in community through social, recreational and employment opportunities, social enterprise initiatives, and individual capacity building.

Research:

Research refers to activities that create and mobilize knowledge for action by communities, civil society, policy makers, and stakeholders in all of the key areas affecting the current and future social, economic, and environmental sustainability of Canada.

Salaries and Benefits Expenses:

Expenses related to the staff employed/working on the program/project. They include items such as salaries/benefits for all employees (full time or part time) and contract staff.

Social Services Sector:

Organizations/agencies whose mission is to provide meaningful opportunities to improve the lives of the disadvantaged population groups such as children, disabled persons, seniors, and vulnerable persons in the community by providing services such as educational support, day programs, counselling, housing support, skills development etc.

Target Population: A specified group of people who are the focus of any work toward achieving the strategic priority. Within each strategic priority definition a group of people with specific identifiers (e.g. age, socio-economic status, risk factors, vulnerability, issues, and barriers) are described.

Target Result:

A target result is a measurable performance or success level that a program or initiative plans to achieve within a specified time period. Both outcome and output indicators require specific targets which could be numbers, percentages, complete/not complete, yes/no etc. …

Travel and Transportation Expenses:

All staff, contractor and volunteer travel as well as client transportation costs. Includes programmatic transportation costs as well as administrative travel costs.

APPENDIX I – FOCUS AREA DESCRIPTIONS

HEALTHY PEOPLE, STRONG COMMUNITIES

Description	For a community to be great, it must be great for everyone. Together, we revitalize vulnerable neighborhoods and communities, provide support for vulnerable seniors and those living in poverty, and provide those facing mental health and crisis with the supports they need, when and where they need it.
Priorities and Tools	We pursue an impact strategy that understands and prioritizes both prevention and intervention approaches to support individuals and communities via culturally and age-appropriate programs that provide the support needed to move people from crisis to stability. We prioritize actions that work towards goals that include, but are not limited to: • People experiencing mental health and/or addictions challenges have access to coordinated community-based supports • The well-bring of seniors is improved by reducing the factors that lead to isolation and vulnerability while respecting their independence • Building healthy and vibrant communities by increasing equity, social cohesion, and inclusion United Way East Ontario is committed to making sure that all members of our community can get the help they need, when they need it. We know that these challenges cannot be solved by one organization, or one program acting alone. By investing in research informed programs and initiatives with measured results, and by convening the community and advocating for change, United Way brings government, researchers, agencies, corporate partners and other funders together to address and respond to the serious issues faced by communities in our region.
Target Populations	Priority populations are residents from equity seeking/equity deserving groups, including low-income, multicultural, Francophone, Indigenous, rural residents, those with disabilities, 2SLGBTQ+ adults and communities, and seniors. This focus area also prioritizes programming which serves residents of at-risk neighbourhoods in order to ensure safety and sustainability in the community as a whole.

ALL THAT KIDS CAN BE

Description	Every child has the right to a good life, a safe place to grow up, to learn, and to make good friends - no matter where they live or what their personal circumstances are. That means succeeding in school and in life and staying on track to graduate so that they can enter adulthood ready to take on the world.
Priorities and Tools	Our vision is that kids facing the greatest challenges receive the encouragement, supports and opportunities that they need to succeed in school and in life. We plan to accomplish this by ensuring that: • Vulnerable kids and their parents have evidence informed programming that boosts their health and well-being, and ensuring that they start school with their peers, ready to learn. • Children and youth in priority (at-risk) neighbourhoods and communities have a safe place to learn and grow, and build healthy relationships outside of school through enhanced homework clubs, Summer Achievement programming, Science Technology Engineering Arts and Math (STEAM) learning and graduation focused programming and activities that put them on track to graduate on track with their peers. • Children and youth experiencing crisis have access to timely supports and interventions that addresses substance use and improved mental health. • Our communities are mobilized to invest in proactive, integrated and comprehensive programming, services and systems that offer children and youth at risk of and/or experiencing homelessness a chance to get back on track -through prevention, diversion and life skills, employment and housing supports. United Way knows that these challenges cannot be solved by one organization, or one program acting alone. By investing in research informed programs and initiatives with measured results, and by convening the community and advocating for change, United Way brings government, researchers, agencies, corporate partners and other funders together to address and respond to the serious issues faced by kids and their parents in our region.
Target Populations	Priority populations are infants, children, youth and their caregivers from equity seeking/equity deserving groups, including low-income, multicultural, Francophone, Indigenous, rural residents, those with disabilities, and 2SLGBTQ+ infants, children, and youth.

POVERTY TO POSSIBILITY

Description	We want our communities to be accessible, inclusive, and financially equitable for everyone. United Way is working to ensure adults and youth facing barriers find sustainable employment that provides them with a pathway out of poverty and resources to become financially secure.
Priorities and Tools	We invest in programs that offer pre-employment training, job finding and retention support, career mentorship opportunities, school to work transition opportunities, employment related social enterprise ventures and financial literacy programs. We prioritize actions that work towards goals that include, but are not limited to: • Improving employment and labour market outcomes for newcomers • Improving employment and labour market outcomes for people with disabilities • Improving community members' access to literacy and skills development to improve employment and overcome health barriers. United Way knows that these challenges cannot be solved by one organization, or one program acting alone. By investing in research informed programs and initiatives with measured results, and by convening the community and advocating for change, United Way brings government, researchers, agencies, corporate partners and other funders together to address and respond to the serious issues faced by kids and their parents in our region.
Target populations	Priority populations are equity seeking groups willing to participate in the labour force, including low-income, multicultural, Francophone, Indigenous, rural residents, those with disabilities, and 2SLGBTQ+ individuals.

APPENDIX II - INDICATORS

All That Kids Can Be

Focus Area	Type	Indicator Description	Unit of Measure	Definition	Method	Common / Standard
ATKCB	Output	Calls to crisis line	Number	Number of calls to crisis line that were answered	Count of all crisis calls that were answered	Standard
ATKCB	Outcome	Client distress is reduced	Percent	Clients indicating decreased levels of distress	# of clients demonstrating decrease in experienced distress/ # clients assessed for distress reduction	Common
ATKCB	Outcome	Clients achieve counselling or program goals	Percent	Counsellor and client conduct a progress review at termination comparing to initial assessment. Program goals can include achievement of life skills, coping mechanisms, literacy, etc.	# of clients achieving one or more goals / # of counselling clients assessed for goal attainment.	Common
ATKCB	Output	Total Referrals	Number	Number of referrals provided to clients	# of referrals for all clients	Common
ATKCB	Outcome	Children develop soft skills	Percent	Soft skills: the essential personal and social skills people need to be able to perform most jobs. E.g. leadership, critical thinking, problem solving, teamwork, conflict resolution, time management, personal presentation, communication, positive attitude, self-confidence etc…	# of children complete program to develop skills / # of children participate in program	Common
ATKCB	Outcome	Children have improved attitude towards school	Percent	Children and/or youth supported by the program report or demonstrate improved attitude toward school/ school work.	A survey or observation taken of supported participants. A count is kept of all participants who either report or demonstrate improved attitude toward school/ school work. This number is divided by all participants surveyed or observed.	Standard
ATKCB	Outcome	Children have improved emotional well-being	Percent	Children and/or youth supported by the program report or demonstrate improved emotional well-being including self-esteem, confidence, social belonging and/or motivation	A survey or observation taken of supported participants. A count is kept of all participants who either report or demonstrate improved emotional well-being. This number is divided by all participants surveyed or observed.	Common
ATKCB	Outcome	Increase in children practicing prosocial behaviors	Number	Increase in children practicing prosocial behaviors. Agency to provide examples of types of behaviors practiced.	Interview, focus group or survey of parents, children, staff and/or instructors. Agency to indicate selected method.	Common
ATKCB	Output	Individuals served participating in physical activity and/or healthy	Number	Program examples: those that promote the benefits of an active lifestyle and encourage participation in regular physical	Activity or program participant list and report	Standard

		food access/nutrition programs		activity as a means of improving health, preventing disease, and enhancing the overall quality of life. Also nutrition education, food distribution programs, child nutrition programs etc...		
ATKCB	Output	Participants completing their homework	Percent	Children and/or youth supported by the program completing their homework each day	Yearly average of the number of students who complete their homework each day as a result of program support divided by enrolled participants	Standard
ATKCB	Output	Clients attending group counselling sessions	Number	Clients registered with Agency, attending regular (e.g. weekly, bi-weekly etc…) group (e.g. more than one person) counselling sessions. (Agencies can further specify whether this is family, mixed group, couples etc…)	# of clients regularly attending counseling sessions	Standard
ATKCB	Output	Clients attending individual counselling sessions	Number	Clients registered with Agency, attending regular (e.g. weekly, bi-weekly etc…) one-on-one counselling sessions. (Agencies can further define clients as adults, youth etc…)	# of clients regularly attending counseling sessions	Standard
ATKCB	Outcome	Clients equipped with positive coping strategies	Percent	Clients who demonstrate or report positive coping strategies such as: positive self-talk, more sleep, more exercise, talking to trustworthy people, relaxation techniques, healthy eating, positive attitude etc…	# of clients demonstrating or reporting positive coping strategies / # of clients assessed for coping strategies	Common
ATKCB	Outcome	Clients served who avoid or reduce risky behaviours	Percent	The most commonly recognized risky behaviors among youth and adults include alcohol, drug, and tobacco use and unprotected sexual activity	# of individuals who reduced or avoided any of the aforementioned risky behaviors / # of individuals served by programs addressing any or all of these risky behaviors	Common
ATKCB	Outcome	Clients with academic or employment success	Percent	Improved Attendence (hours), credits earned, completion of year, Graduation, employment, post-secondary enrollment etc..	# clients reporting or observed to have improved academic or employment outcomes / # of clients monitored for academic or employent outcomes	Standard
ATKCB	Outcome	Clients with improved connections to family, friends and community	Percent	Clients experiencing better relations, less isolation, feeling better about relationships, stronger support network etc.…	# clients reporting or observed to have improved connections / # of clients monitored for improved connections	Standard
ATKCB	Outcome	Clients with improved mental health outcomes	Percent	Agency to list types of outcomes. Outcomes could include improved resilience, ability to cope, reduced anxiety, improved life satisfaction, fewer symptoms of depression, improved self-esteem etc…	pre and post survey of clients with one or more improved mental health outcomes reported or observed	Common
ATKCB	Outcome	Clients with reduced suicide ideation	Percent	Clients with reduced frequency/intensity of thinking about ending their life or dying by suicide	# of clients reporting reduced frequency of suicide ideation/ # of clients with presenting issue of suicide ideation.	Standard
ATKCB	Outcome	Consistent Participation (previously referred to as Improved Client Engagement)	Percent	Pattern of attendance or contact	# of clients with improved attendance (showing up for appointments) or contacts or otherwise displaying improved engagement / # of clients assessed for enagement	Standard

ATKCB	Outcome	Children (0-5) served who achieve developmental milestones	Percent	Developmental milestones are behaviors or physical skills seen in infants and children as they grow and develop. Rolling over, crawling, walking, and talking, follows 2-step directions are all considered milestones. The milestones are different for each age range	pre and post EDI survey of children	Common
ATKCB	Output	Children regularly participate in play and parental interaction	Number	Unique children participating regularly (at least 1 times per month) in group play with guided parental interaction	Count of unique children participating at least 1 times per month	Standard
ATKCB	Outcome	Children served who are proficient on school readiness assessments by the end of their (Sr.) kindergarten year	Percent	This indicator refers to the percent children served that are proficient on readiness assessments (e.g. EDI).	pre and post survey of # of children assessed to be school ready / # of children participating in program	Common
ATKCB	Output	Early childhood staff trained to provide quality programs, services	Number	staff trained to improve the quality of programs and services delivered in the area of Childhood Success and school readiness	# of staff complete training	Standard
ATKCB	Output	Families, caregivers supported	Number	Families, caregivers served that are provided with information, resources, tools, trainings, and/or teaching skills	Count of unique families / caregivers that are served by the program	Standard
ATKCB	Outcome	Increased awareness of children's developmental needs and how to address them	Percent	Parental/ Caregiver awareness of their children's developmental, physical health and well-being needs and what practices are important to address those needs	A survey taken of trained participants. A count is kept of all participants who demonstrate improved awareness.	Common
ATKCB	Outcome	Parent-child relationships are improved	Percent	Parent-child relationships are improved (e.g. secure attachment, use of positive discipline, coping skills for stress and anger)	A survey or observation taken of supported participants. A count is kept of all participants who either report or demonstrate improved parent-child relationships. This number is divided by all participants surveyed or observed.	Common
ATKCB	Outcome	Parents/caregivers have increased confidence in parenting ability	Percent	Program participant parents or caregivers have increased confidence in parenting/ care giving ability	Parents surveyed indicate that their confidence level has increased as a result of program supports. Average number of parents with increased confidence is divided by all parents surveyed.	Common
ATKCB	Output	Agency has capacity to provide more youth supports to maintain permanent housing	Percent	Youth aged 16-25 provided with supports to maintain permanent housing including, but not limited to, those related to employment, financial literacy, mental health counseling, education, tenant services etc… (Agency to specify types of supports provided) compared to previous year)	Count of clients contacts (assessments, counseling, coaching, mentoring, training etc…) throughout the year divided by same figure from previous year. Clients may be counted more than once in a year.	Common
ATKCB	Outcome	Clients who through support have had needs met to support maintenance of permanent housing	Percent	At initial assessment the specific needs/risk factors of the youth aged 16-25 is assessed. A re-evaluation determines which of those needs have been met	Clients for whom at least 25% of their identified needs have been met by the 6 month reassessment divided by all	Standard

				through supports. Risk factors/needs could be related to employment, financial literacy, mental health or addictions counseling, education, health, social contact, tenant services, housekeeping etc... or other)	clients who have undergone the 6 month reassessment.	
ATKCB	Outcome	Number of youth housed	Number	Youth aged 16-25 who were homeless or living in transitional housing who move or are being supported after their move into affordable housing with no limitations or requirements.	Count of supported youth in housing during the year	Common
ATKCB	Outcome	Supported youth who keep permanent housing for six months	Percent	Youth aged 16-25 who find and keep affordable housing with no limitations or requirements for at least 6-months	Youth clients who have maintained their permanent housing for six months or more divided by Youth supported during the year	Standard
ATKCB	Outcome	Supported youth who move in to permanent housing	Percent	Youth aged 16-25 who were homeless or living in transitional housing who move into affordable housing with no limitations or requirements.	Youth attaining housing during the year divided by Youth supported during the year	Standard
ATKCB	Outcome	Youth finding long-term employment	Percent	Youth aged 16-25 receiving supports who find long-term or permanent employment. Employment must adhere to labour market standards.	those finding employment long-term or permanent employment in the year divided by all youth for whom this type of work would be appropriate.	Standard
ATKCB	Outcome	Youth in temporary employment	Number	Youth aged 16-25 receiving supports who find employment in a social enterprise or temporary (time limited) employment program or a job that is seasonal or otherwise time limited. Employment must adhere to labour market standards.	those finding temporary employment in school in the year	Standard
ATKCB	Outcome	Youth job retention (6-12 months)	Percent	Youth aged 16-25 receiving supports who obtain and keep paid employment for six to twelve months. Employment must adhere to labour market standards.	Youth who obtain and keep paid employment for six to twelve months divided by all clients who obtained employment through support by agency	Standard
ATKCB	Output	Youth that complete job skills, entrepreneurship training programs, internships, apprenticeships	Percent	Youth aged 16-25 receiving supports that complete job skills, entrepreneurship training programs, internships, apprenticeships	Count of supported youth completing these types of programs in the given year divided by youth served for whom this type of program would be appropriate.	Standard
ATKCB	Outcome	Youth that enroll in an education program, secondary school or a job training programs	Percent	Youth aged 16-25 receiving supports that enroll in secondary school, post-secondary education program or job training programs such as job skills, entrepreneurship training programs, internships, apprenticeships	Count of supported youth enrolled in the given year divided by all youth where this would be appropriate	Standard

Healthy People, Strong Communities

Focus Area	Type	Indicator Description	Unit of Measure	Definition	Method	Common / Standard
HPSC	Outcome	Increased ability to lead research in support of focus area	Number	Studies with practical and actionable recommendations in support of United Way focus areas completed and accessible (Agency to cite study name/purpose).	Study must be accessible to those who can use the information and useful/functioning to be considered complete.	Common
HPSC	Outcome	Internal Operations & Management Capacity is improved	Agency's choice	Improved Internal Operations and Management Capacity (HR, finance, project management, governance, infra-structure). (Agency to cite which type of capacity is to be improved and how.)	Agency to describe how they will quantify the improved capacity.	Common
HPSC	Outcome	One or more collective impact pillars has advanced or improved	Agency's choice	One or more collective impact pillars (mutually reinforcing activities, continuous communication, backbone support, shared measurement, common agenda) has advanced or improved as a result of capacity building supports	Agency to describe how they will quantify the advancement/improvement	Common
HPSC	Outcome	Programs Improved (internal evaluation)	Percent	Capacity of the supported program (s) is enhanced. Improvement s in procedures, policies, methodologies, use of resources, responsiveness/ effectiveness, services provided etc... Improvements are measured through the supported program self assessing. (Agency to cite specific capacities being enhanced)	Administer pre-service and post-support survey to Program senior management requesting self assessment using a 6 point Likert scale on agency capacities targeted for improvement. Calculation: Number of measured capacities demonstrating at least a 1/6 scale improvement divided by number of capacities measured on both pre- and post-service surveys.	Common

HPSC	Outcome	Supported agencies are able to leverage additional resources (cash) to support priority goals	Percent	Refers to the year to year change in financial resources	Current year revenue divided by previous year revenue	Common
HPSC	Outcome	Supported agencies are able to leverage additional resources (in-kind) to support priority goals	Number	Refers to the year to year change in in-kind resources	Current year in-kind value	Common
HPSC	Outcome	Supported programs increase beneficiaries served as a result of capacity building	Percent	Programs who receive capacity building support through the funded program are able to increase beneficiaries served as a result of the increased capacity.	Collect beneficiary data from programs at start and following intervention (agency to determine appropriate follow up timeframe). Calculation: Total beneficiaries at follow up/Total beneficiaries at start = % increase	Common
HPSC	Output	Calls to crisis line	Number	Number of calls to crisis line that were answered	Count of all crisis calls that were answered	Standard
HPSC	Outcome	Client distress is reduced	Percent	Clients indicating decreased levels of distress	# of clients demonstrating decrease in experienced distress/ # clients assessed for distress reduction	Common
HPSC	Outcome	Clients achieve counselling or program goals	Percent	Counsellor and client conduct a progress review at termination comparing to initial assessment. Program goals can include achievement of life skills, coping mechanisms, literacy, etc.	# of clients achieving one or more goals / # of counselling clients assessed for goal attainment.	Common
HPSC	Output	Clients with access to crisis support resources	Number	Total Number of clients provided navigation support to access crisis support resources		Standard

HPSC	Output	Total Referrals	Number	Number of referrals provided to clients	# of referrals for all clients	Common
HPSC	Output	Clients attending group counselling sessions	Number	Clients registered with Agency, attending regular (e.g. weekly, bi-weekly etc…) group (e.g. more than one person) counselling sessions. (Agencies can further specify whether this is family, mixed group, couples etc…)	# of clients regularly attending counseling sessions	Standard
HPSC	Outcome	Clients equipped with positive coping strategies	Percent	Clients who demonstrate or report positive coping strategies such as: positive self-talk, more sleep, more exercise, talking to trustworthy people, relaxation techniques, healthy eating, positive attitude etc…	# of clients demonstrating or reporting positive coping strategies / # of clients assessed for coping strategies	Common
HPSC	Outcome	Clients served who avoid or reduce risky behaviours	Percent	The most commonly recognized risky behaviors among youth and adults include alcohol, drug, and tobacco use and unprotected sexual activity	# of individuals who reduced or avoided any of the aforementioned risky behaviors / # of individuals served by programs addressing any or all of these risky behaviors	Common
HPSC	Outcome	Clients with academic or employment success	Percent	Improved Attendence (hours), credits earned, completion of year, Graduation, employment, post-secondary enrollment etc..	# clients reporting or observed to have improved academic or employment outcomes / # of clients monitored for academic or employent outcomes	Standard
HPSC	Outcome	Clients with improved connections to family, friends and community	Percent	Clients experiencing better relations, less isolation, feeling better about relationships, stronger support network etc….	# clients reporting or observed to have improved connections / # of clients monitored for improved connections	Standard

HPSC	Outcome	Clients with improved mental health outcomes	Percent	Agency to list types of outcomes. Outcomes could include improved resilience, ability to cope, reduced anxiety, improved life satisfaction, fewer symptoms of depression, improved self-esteem etc…	pre and post survey of clients with one or more improved mental health outcomes reported or observed	Common
HPSC	Outcome	Clients with reduced suicide ideation	Percent	Clients with reduced frequency/intensity of thinking about ending their life or dying by suicide	# of clients reporting reduced frequency of suicide ideation/ # of clients with presenting issue of suicide ideation.	Standard
HPSC	Outcome	Consistent Participation (previously referred to as Improved Client Engagement)	Percent	Pattern of attendance or contact	# of clients with improved attendance (showing up for appointments) or contacts or otherwise displaying improved engagement / # of clients assessed for enagement	Standard
HPSC	Outcome	(Research) Study on strengthening social cohesion, equity and inclusion within priority communities completed	Complete	Study on the factors affecting social cohesion, equity and inclusion within priority local communities (place-based) which provides actionable recommendations on how this might be strengthened. Study is complete and shared with stakeholders	Study completed incorporating input received from key stakeholders in the sector and disseminated with stakeholders	Standard
HPSC	Output	Activities/opportunities addressing priority issues	Number	Number of community activities or opportunities that address priority issues. Agency to list activities/opportunities as well as the priority issues each addresses in the methodology	Total count of all activities addressing priority issues. Each activity is counted once even if it addresses multiple issues.	Common
HPSC	Outcome	Dollar value of Cash & In-kind contributions leveraged	Number	Value of cash /in-kind resources contributed towards neighbourhood priorities including events/initiatives using a standard methodology (includes but not limited to value of human resources, space contributions, new funding, in-kind assets).	tally of value of resources contributed towards events/initiatives/neighbourhood priorities	Common

HPSC	Outcome	Initiatives developed as a result of resident engagement	Number	New initiatives that develop as a direct result of resident engagement	Record listing of initiatives	Standard
HPSC	Outcome	Participants with increased meaningful connections	Percent	Participants who feel they or the community are better connected as a result of the project	Participants who respond positively to these survey questions divided by all those surveyed	Common
HPSC	Output	Partnerships	Number	Partnerships developed to support priority neighbourhood initiatives (Agency to specify nature of partnerships (who/roles) in the methodology.)	Count of formal or informal partnerships where roles have been clearly defined and activities are under way	Common
HPSC	Output	Residents participatin g in project activities	Percent	Residents (unique - each individual counted once) in targeted neighbourhoods participating in project activities	Unique participants tracked through event or activity record divided by Ottawa Neighbourhood study neighbourhood population	Common
HPSC	Outcome	Residents with increased access to social opportunities	Percent	Residents who report having increased access to social opportunities	Residents respond positively to these survey questions, divided by the number surveyed.	Standard
HPSC	Outcome	Residents volunteering	Percent	Percent of unique residents who volunteer with project activities (e.g. communications, outreach, small projects e.g. community gardening, small/large events, workshops)	Unique volunteers tracked through event or activity record divided by population. In method indicate if target is a subset of population (e.g. women, seniors, youth)	Common
HPSC	Outcome	Residents with increased access to healthy food	Percent	Residents in food based activities who report having increased access to healthy food	Residents respond positively to these survey questions, divided by the number surveyed.	Standard

HPSC	Outcome	Residents with increased sense of belonging	Percent	Residents participating who report the project has increased their sense of belonging	Residents respond positively to these survey questions, divided by the number surveyed	Standard
HPSC	Outcome	Caregivers report reduced feelings of isolation/stress	Percent	Caregivers report that their stress/isolation level has reduced by one level on the Likert Scale as a result of respite support. Data collection: survey of a representative sample of clients	Administer pre-service and mid-service (and/or post-service) questionnaires (with a 6-point Likert scale) to client. Calculation: clients demonstrating at least a 1/6 scale improvement divided by clients completing both pre-and mid/post-service surveys.	Common
HPSC	Outcome	Client ability to live independently is improved	Percent	Clients report that agency provided services improved their ability to live independently by at least one point on a Likert scale (a predetermined index set by the agency)	Administer pre-service and mid-service (and/or post-service) questionnaires (with a 6-point Likert scale) to client. Calculation: clients demonstrating at least a 1/6 scale improvement divided by clients completing both pre-and mid/post-service surveys.	Common
HPSC	Outcome	Client and / or caregivers awareness of community, social and health resources is improved	Percent	As a result of being coached or attending presentations, clients report increased knowledge of senior support services and community, social, and health resources.	Administer pre-service and mid-service (and/or post-service) questionnaires to client. Calculation: average number of services/resources spontaneously named by participants initially/ average number of services/ resources spontaneously named mid/post-participation. An average of all clients' improvement percentages would be the result.	Common
HPSC	Output	Clients provided with caregiver respite support	Number	Number of clients provided with caregiver respite support	Number of clients from internal records. Each client is counted maximum once per year	Standard
HPSC	Outcome	Clients report improved feelings of well-being	Percent	Overall physical, health, mental, social and emotional well-being of senior participants improves by self-report.	Administer pre-service and mid-service (and/or post-service) questionnaires (with a 6-point Likert scale) to client. Calculation: clients demonstrating at least a 1/6 scale improvement divided by clients completing both pre-and mid/post-service surveys.	Common

HPSC	Outcome	Clients report reduced feelings of isolation /loneliness	Percent	Clients show improved results based on average responses to a series of questions designed to elicit feelings about loneliness/isolation.	Administer pre-service and mid-service (and/or post-service) questionnaires (with a 6-point Likert scale) to client. Calculation: clients demonstrating at least a 1/6 scale improvement divided by clients completing both pre-and mid/post-service surveys.	Common

Poverty to Possibility

Focus Area	Type	Indicator Description	Unit of Measure	Definition	Method	Common / Standard
P2P	Outcome	Clients enrolling in time limited education, or training	Percent	Clients enrolling in time limited (e.g. set end date) formal education, training related to employment to gain job skills	count of clients enrolling in education or employment training each year divided by all clients in the year	Common
P2P	Outcome	Clients obtaining employment	Percent	Clients obtaining employment that adheres to labour market standards as a result of program participation (part-time or full-time). Positions within an agency's own social enterprise excluded.	# of clients obtaining employment each year divided by all clients in the year / # of clients participating in program	Common
P2P	Outcome	Clients obtaining employment (social enterprise)	Percent	Clients obtaining employment that adheres to labour market standards within the agency's social enterprise as a result of program participation. (part-time or full-time)	count of clients obtaining employment each year divided by all clients in the year	Common
P2P	Output	Clients receiving supports to obtain or retain employment	Number	Refers to the number of clients receiving counselling or other supports (employment profiles, orientation sessions, employment plans, CV support, coaching, training) to gain or retain employment. (Agency to specify types of supports offered)	Simple count of unique clients receiving supports. If a client receives more than one type of support, he is only counted once.	Common
P2P	Output	Increase in revenue of social enterprise or self- employment venture	Percent	Increase in revenue (year to year) of social enterprise or self-employment venture employing persons with disabilities. This will show a leveraging of funds	Revenue from most recent year divided by revenue from previous year	Common
P2P	Output	Total new partnerships	Number	Partnerships developed to support priority neighbourhood initiatives (Agency to specify nature	Count of formal or informal partnerships where roles have been clearly defined and	Common

				of partnerships (who/roles) in the methodology.)	activities are under way	
P2P	Outcome	Client job retention (6-12 months)	Percent	Clients who obtain and keep paid employment for six to twelve months	clients with disabilities who obtain and keep paid employment for six to twelve months divided by all clients who obtained employment through support by agency	Standard
P2P	Outcome	Clients gain upward mobility	Percent	Clients receive a promotion, wage increase, or additional hours (20% increase or more)	Number of clients with disabilities who achieve one or more of the factors of upward mobility in the year divided by all clients in the year	Standard
P2P	Output	Customers of social enterprise or self-employment venture increase	Percent	Customers /Service users of social enterprise or self-employment venture employing persons increase year over year	Number of service/sales transactions from most recent year divided by number of transactions from previous year	Standard
P2P	Output	Inclusive workplaces cultivated	Number	Workplaces that have received training, supports, advice, capacity building activities, have staff trained to provide peer support etc…	Count of workplaces that have received multiple types of capacity building supports with the aim of creating an inclusive workplace	Standard
P2P	Output	Job matches /placements developed for clients	Number	the number of employment matches offered to clients looking for work	Count of employment matches offered	Standard
P2P	Output	Participants at community presentations /networking events promoting workplace inclusion and accessibility	Number	Participants at Community presentations/ networking events promoting workplace inclusion and accessibility including raising awareness among employers of the business case for hiring people with disabilities. (Agency to specify types of presentations/events)	headcount or attendance sheets tallying participants at such events	Standard

P2P	Outcome	Research reports/ tools developed focused on improving labour market outcomes and to developing employer case studies on the benefits of creating an inclusive workplace.	Number	Research reports / tools with a focus on identifying ways to improve labour market outcomes and/or developing employer case studies on the benefits of creating an inclusive workplace. Must be completed and shared in a public forum. (Agency to cite study name/purpose).	Study must be accessible to those who can use the information and useful /functioning to be considered complete.	Standard
P2P	Output	Stakeholders sharing best practices in matching people with disabilities with appropriate employment or training	Number	Stakeholders sharing best practices in matching people with disabilities with appropriate employment or skills/readiness training (Agency to describe stakeholders)	Count of stakeholder agencies participating	Standard
P2P	Output	Total employers or employees of an employment organization receive training supports on inclusive workplaces	Number	The number of employers or employees of an organization that receive training support for inclusive workplace. This measures the reach to employers	Count of employers as per internal records	Standard
P2P	Output	Total employees receiving training supports for the first time	Number	The number of new employers or employees of an organization who indicate receiving training support on inclusive workplaces for the first time. This measures the reach to new employees	Count of employers as per internal records	Standard
P2P	Outcome	Youth (ages 15-24) served who gain employment	Number	number of youth ages 15 to 24 who gain employment because of services provided	Survey of youth or parents	Standard
P2P	Output	Youth served who receive job skills training	Number	Job skills training activities may include one or more of the following: interest and skills assessment, testing and counseling, soft and technical skill development and training, job search assistance, apprenticeships, and internships.	# of youth complete job skills training	Standard
P2P	Output	People in financial crisis receive support	Number	Total number of clients provided navigation support to	# of clients provided with financial literacy resources or services	Standard

				access financial literacy resources or services			