

UNITED WAY OF THE COALFIELD EVALUATION OF FUNDED PROGRAMS

The evaluation process consists of 3 key elements. Each element corresponds to a specific level of accountability associated with receiving financial support through the Funds Distribution Process of the United Way of the Coalfield (UWC).

I. Overall Agency Review – 1 report for overall agency. (15 copies + original)

The Overall Agency Review represents the minimum standards of accountability required by the UWC for an agency to receive funding. It is an assessment of the internal systems within an agency that directly influence the quality of programs and service delivery. Part of this element is the Budget Form #1 – the agency's total budget with 3 year comparison, and Budget Form #3 which acknowledges any Donor or Board designations held by your organization.

In addition, *include one copy of the following:*

- Mission Statement,
- List of current officers & directors,
- 2010 Calendar of Events,
- Strategic / Long Range Plans,
- Annual Audit (if total agency budget is over \$100,000),
- Annual Report.

II. Program Description – 1 report per program funded by UW (15 copies + original)

The **Program Description** represents performance plan for each individual program receiving UWC funds. This information provides a very complete picture of each program. The Program Description serves as the basis for the assessment of each program during the funding cycle. Budget Forms #2 report the program budgets as it relates to other programs, total budget, and other sources of funding.

III. Performance Report – 1 report per previous year's program (15 Copies + original)

The **Performance Report** is the annual report on the status of outcome objectives as presented in the Program Description(s) from the previous year.

*Copies should be **THREE HOLE PUNCHED AND PAPER CLIPPED**. Reports are inserted into binders therefore we request that you **DO NOT STAPLE** them or provide covers.*

THANKS FOR YOU COOPERATION.

2010-2011
United Way of the Coalfield
Funds Distribution

Agency _____

Mailing Address _____

City _____ State _____ Zip _____

Physical Address (If Different) _____

City _____ State _____ Zip _____

Director _____

Contact Information:

Phone _____ Fax _____ email _____

Federal ID Number _____

United Way of the Coalfield Funding Proposal:

	<u><i>Allocated</i></u> <u><i>Last Year</i></u>	<u><i>Requested</i></u> <u><i>This Year</i></u>
1. _____	\$ _____	\$ _____
2. _____	\$ _____	\$ _____
3. _____	\$ _____	\$ _____
4. _____	\$ _____	\$ _____
5. _____	\$ _____	\$ _____

Chief Professional Officer

President or Board Chair (Volunteer)

Date

Date

Program Description

The **Program Description** represents performance plan for each individual program receiving UWC funds. This information provides a complete picture of **each program**. The Program Description serves as the basis for the assessment of each program during the funding cycle. Budget Forms #2 report the program budgets as it relates to other programs, total budget, and other sources of funding.

(Please limit program description to three typed pages per program.)

Use the following format for each program description. Use the planning guide in preparing this report.

Program _____ Amount Requested \$ _____

Organization _____

Program Site Address _____

City _____ State _____ Zip _____

Program Director _____

Contact Information:

Phone _____ Fax _____ email _____

Was this program funded by UWC last year? ____ Yes ____ No \$ _____ amount

A. Program Goal

1. What impact do you intend this program to achieve on a specific community need, and key constituencies?
2. What is the broad effect you wish your program to have on the community?

B. Outcome #1 Objective

1. What measureable changes or competencies do you expect clients of this program to achieve? If you conduct this program, what do participants believe, know, have or do as a result?
2. What benefit or change follows from that?

Outcome #1 Indicators

1. What is the specific behavior or characteristic measured to indicate if the program is achieving the outcome?
2. Over what period of time?
3. How will it be measured?

Most programs will have more than one outcome (include as many as needed)

Program Description (continued)

C. Program Methodology

1. Briefly describe the program United Way investment will support and how will you administer this program.

D. Description of Participants

1. What is the projected number of unduplicated clients/customers that you expect to serve in the program over a twelve-month period?
2. Are there any new trends or needs that your funded programs has experienced in the past year. (i.e. participations rates, participant characteristics, etc.)

E. Program Staffing

1. What specific functions are performed by staff and volunteers that have a direct role in the program?

F. Community Content

1. What specific role does the program play within the human service delivery system community-wide?
2. What other agencies have a common interest in the same objective or outcome? How will this program eliminated duplication of services and or encourage cooperation and collaboration.

G. Role/Importance of United Way Funding

1. Are United Way dollars used as a community match required for another funding source?
2. What are the percentages of support from all sources?
3. What is the primary role of United Way funding? (i.e. UWC funding will help provide 25 full scholarships to summer camp or will help provide transportation assistance for 10 clients)

H. Budget forms #2

1. Budget Form 2 presents the agency budget by function and program budget.

AGENCY DEMOGRAPHIC PROFILE OF CLIENTS

By Program

Agency _____

Program _____

Complete one report for each program supported in whole or in part by UWC funds. Figures should represent and **unduplicated** number of individuals served in Hopkins and Muhlenberg Counties (Muhlenberg Co. figures are for informational purposes only)

Classification	Hopkins Co. Actual Yr _____	Hopkins Co. Projection Yr _____	Muhl. Co. Actual Yr _____	Muhl. Co. Projection Yr _____
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AGE				
0-6 years old				
6-18 years old				
19-60 years old				
61+ years old				
Unknown				
TOTAL				

GENDER				
Male				
Female				
Unknown				
TOTAL				

RACE/ETHNICITY				
Caucasian				
African American				
Hispanic/Latino				
Asian				
Other				
Unknown				
TOTAL				

SOCIO-ECONOMIC*				
Household Income Under \$16,700**				
Household Income Over \$16,800-\$30,000				
TOTAL				

* estimate if not known ** Federal poverty level for a family of 4 is \$16,700

OTHER COUNTIES SERVED BY THIS PROGRAM

Performance Report

This is an annual update on each program as presented in the Program Description of the previous year's funding proposal. The Performance Report details actual outcomes of the program during the most recent twelve month period. The Performance Report also provides an opportunity to revise the information presented in the Program Description in order to reflect the experience gained in the reporting period.

The Format for the Performance Report is as follows:

AGENCY _____

PROGRAM _____

A. Outcome Objectives

1. Restate each outcome objectives of the program.
2. Report on the actual performance of each outcome objective for the most recent 12-month period.
3. State the factors causing the different between the outcomes originally projected and the actual outcome.

B. Program Participation

4. Report on the actual and unduplicated rate of participation in the program.

C. Program Improvements

5. Summarize the changes to the program that have been made as a result of the experience and knowledge gained since the Program Description was submitted. Include any applicable improvements in methodology, staffing, and funding of the program.

The performance Report should be limited to three typed pages per program.

Writing Effective Outcome Objectives

(This page is for informational purposes only)

Ask yourself what you want to be true of program participants or intended beneficiaries during or after your program. The answers (for example, “At-risk teens in the mentoring program recognize that school achievement is necessary to future success”) are outcomes.

Look at what your participants say about why they came to your program. While their answers are probably not in “outcome format,” their words and phrases often are much more compelling than those of staff.

When possible, put program participants, intended beneficiaries, or target audiences as the subject or “doer” of the outcome. This helps assure that outcomes focus on participants or beneficiaries, not on the process of the program. For example:

1. Adults completing a literacy program are able to read at a sixth-grade level.
2. Adults with a history of physical aggression express frustration verbally rather than physically.
3. Spouses of adults with a history of physical aggression do not suffer further physical abuse
4. Parents who hear the public service announcements on the importance of immunizations make sure their children are immunized.
5. Babies of women in the prenatal class are born healthy.

Sample components of a program outcome objective statement are:

Who Will Change?	What Will Change?	When Will Change Occur?	Who Much Change?
Homebound	Hunger	After 6 Months	Eliminate
Teen Parents	Child Abuse	After 1 Year	Stop
Teens	Unemployment	By Labor Day	65% Reduction
High School Seniors	Graduation Rates	By June 30, 2009	70% Improvement
County Residents	Poverty	Annually	10% Reduction
Neighborhoods	Crime	Semi Annually	32% Reduction

Avoid Writing objectives that specify a process rather than an outcome or desired effect.

Poor example: “To provide at least 2,000 counseling hours for at least 200 clients.”

Better example: “To reduce the total indebtedness of clients provided credit counseling by 50% in 2009.”

Program Impact Success Story

AGENCY _____

PROGRAM _____

How might your agency illustrate that your program(s) have and impact in the lives of the people you serve? How are lives changed by your United Way funded programs(s)? Please provide UWC with one interesting story for each program. This story gives your organization the opportunity to offer anecdotal evidence of the impact of your program. It also gives United Way evidence to use in marketing and programs to potential donors who want to see results, that their support of the United Way and ultimately that your agency's programs truly makes a different in our community.

1. Contact information of client in story:

(Care will be taken to ensure confidentiality if requested by the client)

Name _____

Address _____

City, State, Zip _____

Home Phone _____

Work Phone _____

Agency Contact Person _____

Agency Phone _____

2. Does the name need to be changed for publicity purposes?

Yes _____ No _____

3. Is Client willing to have a photograph taken for use in a brochure, news story or ad?

Yes _____ No _____

4. Is client willing to be interviews on television?

Yes _____ No _____

5. Is client willing to be interviewed on radio?

Yes _____ No _____

6. Is client willing to participate in United Way's Speakers' Bureau?

Yes _____ No _____

7. Has the media covered this story in the past?

Yes _____ No _____

8. Please provide details of the success story on an attached page.

9. If this story is used, the client will be asked to sign a release from provided by UW.

Marketing Support

Please provide a minimum of one example for each of the following:

(Think of practical examples that might impact a donor's decision to give generously – for example...)

Less than \$1 per week (\$50) provides a week's worth of emergency food for three families through the Salvation Army...

Less than \$2 per week (\$100) provides xx number of nights of safe housing for a mother and child through the Family Violence Program...

Less than \$5 per week (\$250) delivers hot meals to xx senior citizens through Meals on Wheels...

Less than \$10 per week (\$500) allows xx at-risk girls to attend Girl Scout's Outreach Program for a full year...

Less than \$25 per week (\$1,000) provides nine months of after school care for 15 at-risk girls through Operation Sunshine and one year's membership for 15 at-risk youth at the Boys' & Girls Club...

Less than \$1 per week (\$50 a year) provides...

Less than \$2 per week (\$100 a year) provides...

Less than \$5 per week (\$250 a year) provides...

Less than \$10 per week (\$500 a year) provides...

Less than \$25 per week (\$1,000 a year) provides...

UWC Allocations

FINAL CHECK LIST

Proposal Due Date: May 31, 2010

<u>Document</u>	<u># Copies</u>
_____ Complete Allocation Packet	Original + 15 Copies

Complete allocation packet includes the following sections:

- _____ Cover Page
- _____ Overall Agency Review
- _____ Budget Forms #1 & #3
- _____ Program Description (One for each program requesting funding)
- _____ Budget Form # 2 (One for each program requesting funding)
- _____ Agency Demographic Profile of Clients (One for each program requesting funding)
- _____ Performance Reports (One for each program requesting funding)

Note: Agency budget may be submitted for Budget Form #1 if comparable data provided.

_____ Please submit one copy of the following items with allocation packet

- | | |
|---|---------------|
| _____ Program Impact Success Stories | 1 Per Program |
| _____ 2010 Board List | 1 |
| _____ Schedule of Board Meetings | 1 |
| _____ Recent Audit | 1 |
| _____ Strategic Plan | 1 |
| _____ Partnership Agreement | 1 |
| _____ Counter Terrorism Compliance Form | 1 |
| _____ Tax Exempt Status | 1 |
| _____ Articles of Incorporation | 1 |

3-Hole Punch all pages

These proposals will be compiled into loose-leaf binders for our volunteers so please do not put them into report covers or staple.