

REQUEST FOR PROPOSAL

2025-2027 FUNDING CYCLE



UNITED WAY
Chautauqua
County

**Application Guide to receiving
funding from United Way of
Chautauqua County**

APPLICATION DUE DATE
January 31, 2025

DUNKIRK OFFICE

626 CENTRAL AVE

DUNKIRK, NY 14738

JAMESTOWN OFFICE

208 PINE STREET

JAMESTOWN, NY 14701

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STRONGER TOGETHER:

MESSAGE FROM UNITED WAY OF CHAUTAUQUA COUNTY LEADERSHIP

Since 2014, United Way of Southern Chautauqua has approached our community impact strategy and funding focus utilizing an outcome-based approach. The goal has been to demonstrate a measurable impact in a few key areas while continuing to address broader basic and safety net needs in the community, creating a “roadmap to success.”

Ten years later, we are in a new organizational phase that represents a broader and deeper impact, as well as the second century of mission: mobilizing the community to help every person and family improve their lives. In 2024, the two United Ways of Chautauqua County successfully merged.

This Request for Proposal (RFP) is not only the application guide to receiving funding, but it represents a new countywide funding framework (see page 8 for the updated roadmap to success).



SOME SIGNIFICANT BACKGROUND REGARDING THIS RFP AND FUNDING FRAMEWORK:

- In 2023, we engaged a third party consultant to do an equity audit of our allocations process and this document. We implemented many of her recommendations, including making it more accessible and incorporating feedback from our community partners and community meetings.
- Some changes were made based on feedback from our community partner quarterly roundtables and from our allocations process last year (we utilized the site visit in 2023 as a way to identify current needs and existing gaps post pandemic).
- We continue our focus on ALICE (Asset-Limited, Income-Constrained, Employed) and identifying ways to assist this demographic.
- Collaboration and partnership continue to be a core value of the United Way of Chautauqua County. It is a critical component of leveraging resources and what it means to be “stronger together.”

Agencies whose programs receive funding are called United Way “community partners.” We use this language very intentionally and truly value your partnership in our mission.

Thank you,

A blue ink signature of Amy Rohler.

Amy Rohler, Executive Director

A blue ink signature of Christine Tarbrake.

Christine Tarbrake, Board President

OUR MISSION: United Way of Chautauqua County mobilizes the community to help every person and family improve their lives.

SECTION 1 - OVERVIEW

The collective giving through United Way of Chautauqua County's annual fundraising campaign powers our community impact strategy and allocations process in the following fiscal year. Approximately \$1,150,000 will be allocated in each year of our next two year funding cycle towards providing grants that align with UWCC's funding framework. UWCC **funds programs not agencies**. We do not fund capital or building projects.

PROGRAM ELIGIBILITY

Agencies that provide services in Chautauqua County registered as a 501(c)3 not-for-profit--providing programming that aligns with the at least one of the following **Strategic Impact Areas**:

- **Youth Opportunity:** helping young people realize their full potential from birth to graduation.
- **Health Equity:** improving the health and wellbeing for all, especially vulnerable populations.
- **Community Resiliency:** addressing immediate needs today to strengthen the community and prepare for tomorrow.
- **Self-Sufficiency:** creating a stronger financial future and ready workforce for every generation.

Agencies that are able to report data that align with the outcomes and indicators in at least one of the Strategic Impact Areas.

Agencies that are willing to sign and comply with the requirements of funding outlined in the funding agreement. Before applying, please review page 6: Benefits and Responsibilities of Funded Programs and United Way Community Partners.

ALLOCATIONS FUNDING PERIOD

The funding period will be from July 2025 through June 2027, with quarterly allocation payments. Applications for funding are due January 31, 2025. An expanded and detailed timeline is provided on the next page.

MINIMUM FUNDING REQUEST

The minimum request for annual funding from United Way of Chautauqua County is \$7,500. The use of United Way funds must be outlined in the program budget. Allocations grants range from \$7,500 to \$155,000.

INFORMATION SESSIONS:

UWCC will host two information sessions. The Dunkirk session is at the SUNY Fredonia CIED Tech Incubator at 214 Central Avenue on December 12th from 9-11am. The Jamestown session is at the SCFCU Training Center at 110 Mall Blvd. in Lakewood on December 18th from 9-11am. During this session we will provide an overview of this document, the application process, and answer questions. A Zoom link will also be provided at www.uwayscc.org (along with the recording of the information sessions).

FOR GENERAL INQUIRIES:

If you need assistance or have questions about the application process, including using Chautauqua Grants, please contact Eric Rinaldo, Community Impact Manager, via erinaldo@uwayscc.org or by calling either the Dunkirk (716-366-5424) or Jamestown office (716-483-1561).

SECTION 1 - OVERVIEW

APPLICATION PROCESS & TIMELINE

- Grant proposals will only be accepted at www.chautauquagrants.org
If you need assistance with this please contact Eric Rinaldo, Community Impact Manager, who will provide support and help. Grant proposals can be submitted beginning December 18, 2024 through January 31, 2025.
- The funding will be for a period of two years with the first of quarterly allocations starting on July 1, 2025.
- The second year will not require a competitive reapplication, however will be subject to available funds.
- We will conduct a site visit with all agencies in 2026.
- Reporting is due July 31 and January 31 each funded year.
- Agencies may apply for a grant for more than one program.
- United Way allocations volunteers are put into smaller panels, who review applications, conduct a site visit, evaluate programs using consistent criteria, and recommend funding.

DECEMBER 6, 2024

RFP / Application Guide publicly available through website and email communication

DECEMBER 12, 2024

Community Partner Round Table #1
SUNY Fredonia CIED in Dunkirk

DECEMBER 18, 2024

Community Partner Round Table #2
SCFCU Training Center in Jamestown
Application available on Chautauqua Grants

JANUARY 31, 2025

Completed Application for 2025-2027 due.
Interim data report due for programs funded during 2024-2025 cycle. (July 2024-December 2024 Period)

FEBRUARY 25-27, 2025

Scheduling of site visit presentations

MARCH 3 - MAY 2, 2025

Site visits with allocations volunteers

MAY 2025

Community Impact Committee reviews funding recommendations

MAY 27, 2025

UW Board votes on funding recommendations

JUNE 2025

Individual meetings to review Scorecard and Funding Agreement

JULY 31, 2025

Final Report due for agencies funded during 2024-2025 cycle (July 2024-June 2025 Period)

SECTION 1 - OVERVIEW

BENEFITS & RESPONSIBILITIES OF FUNDED PROGRAMS / COMMUNITY PARTNERS

United Way of Chautauqua County uses the term “Community Partner” to refer to those agencies who receive funding for one or more of their programs. The following list includes both the responsibilities and benefits of partnership with United Way:

- Community Partners that are chosen to receive funding are required to sign a funding agreement. An overview of the program funding agreement will be shared alongside the award letter in June 2025.
- Funded programs will report data and provide a narrative report four times over the two-year funding period (January 31, 2026; July 31, 2026; January 31, 2027; July 31, 2027). Reports are typically submitted via [Chautauqua Grants](#). Support and help for developing a system for collecting and reporting data is available through the Community Impact Manager.
- Community Partners will attend quarterly community partner roundtable meetings where networking, professional development opportunities, peer learning and community collaboration opportunities are available. It is the expectation that at least one person from the program attend these events, but community partners are in the best position to know if (on that particular day) it is appropriate for the UWCC gathering to be their priority. Unavailability to attend should be communicated in advance.
- Community Partners will maintain an up to date, accurate profile on [211WNY.org](#). Apply and maintain participation in the State Employee Federated Appeal (SEFA) campaign as a Countywide participant (885)

COMMUNITY PARTNER ROUNDTABLE MEETINGS 9-11 am	
2024	December 18
2025	March 12
	June 17
	September 18
	December 18
2026	March 18
	June 16
	September 17
	December 17
2027	March 18
	June 17
	September 16
	December 16

Dates are subject to change and locations are TBD.

- The United Way logo /Community Partner Cling should be displayed as acknowledgment that the Community Partner receives United Way funding should be communicated within your promotional items used for the program. Community Partners should also like/follow UWCC on social media channels so they can be tagged in relevant posts.
- Community Partners are encouraged to conduct a United Way Employee Giving Campaign to give employees and volunteers an opportunity to support the United Way at your agency.
- Community Partners should take advantage of opportunities for speakers from your organization to participate in campaign events that will educate the community about your work / our collective work.
- Updates or anticipated changes to the program will be shared with United Way staff in a timely manner. Requests for changes in how funds will be spent must be sent to United Way for approval.
- Community Partners may not conduct fundraising activities or direct mail appeals from **September 1 - November 15th** (“Blackout Period”). Requests for exceptions should use the “supplemental fundraising” form. UWCC will share Community Partners fundraising events outside of the blackout period through social media and other channels.

SECTION 2 - FUNDING FRAMEWORK

In 2024, the United Way of Chautauqua County identified four strategic impact areas that would focus our county-wide community impact strategy: **Youth Opportunity, Health Equity, Community Resilience, and Self-Sufficiency**. These four impact areas take into consideration the unique qualities of our region and reflect the currently identified needs, service gaps, and barriers that exist within our community. Based on [NYS Education data](#), for example, 62% of the students in Chautauqua County public schools are economically disadvantaged. 243 students are homeless. 87% of white students in Chautauqua County graduated from high school in 2021, compared to 78% of their Black or African American classmates and 70% of their Hispanic or Latino classmates. More than 25% of the Chautauqua County population have at least three risk factors when it comes to “community resiliency” (e.g., poverty, single household, communication barrier, lack of employment, disability, no health insurance, over age 65, no internet or vehicle access) per [the Community Resilience Estimates \(CRE\) program](#). 17% of Chautauqua County’s households are living below the poverty level. People of color are disproportionately affected by poverty in Chautauqua County: 32% of Hispanic and 20% of Black households are living below the federal poverty level according to [ALICE data](#).

While these are challenging statistics, it is our intent to be a catalyst in creating measurable impact and support programs that address these issues in our community. UWCC is committed to funding programs and services that will create lasting and sustainable change throughout Chautauqua County as they align with these four strategic impact areas. We will give preference to programs who work with members of households living in financial hardship, marginalized populations, and people of color as described in the Key Terms (page 18).

Each impact area has its distinct contributions to our mission of improving the lives of every person and family in our community; however, all impact areas collectively work together to create lasting and sustainable resiliency, resulting in a community that thrives. The funding framework on the following page lays out our roadmap to success. In each of the four strategic impact areas, we have identified the specific outcomes we are trying to achieve, along with the indicators that will measure progress. Programs that receive funding from United Way of Chautauqua County fit within this framework.

The following pages elaborate on each area of the framework, providing community data that undergirds our funding focus.



**YOUTH
OPPORTUNITY**



HEALTH EQUITY



**COMMUNITY
RESILIENCY**



**SELF
SUFFICIENCY**

FUNDING FRAMEWORK 2025-2027: ROADMAP TO SUCCESS

STRATEGIC IMPACT AREA	OUTCOME	INDICATOR
<h2 data-bbox="76 304 306 427">YOUTH OPPORTUNITY</h2> <p data-bbox="76 465 352 546">Helping young people realize their full potential from birth to graduation</p>	Children enter school ready to succeed	<ul style="list-style-type: none"> # Babies and children are reaching developmental milestones # Children identified, referred, and accessing needed support services # Children are enrolling in high quality pre-k programs
	Youth are provided with the knowledge, skills and support necessary to reach their potential.	<ul style="list-style-type: none"> # Youth that are receiving social, emotional and mental health support that results in improved functioning, as measured by pre/post tests # Youth that are receiving before and after school services that support academic and personal development # Youth engaging with a mentor # Youth increasing soft skills knowledge as measured by pre/post assessment
	Youth are on track to graduate and are career / college ready.	<ul style="list-style-type: none"> # Youth that are equipped with financial literacy skills # Youth that are performing math at grade level # Youth that are reading at grade level # Youth that are improving their school attendance # Youth participating in career exploration programs # Youth graduating from high school
	Families and individuals are engaged and empowered to support their children's success.	<ul style="list-style-type: none"> # Parents are being trained in child development and successful parenting skills, as evidenced by pre/post-test assessments # Families/caregivers served are provided with information, resources, tools, trainings and/or teaching skills
<h2 data-bbox="76 875 331 931">HEALTH EQUITY</h2> <p data-bbox="76 969 336 1050">Improving health and well-being, especially vulnerable populations</p>	Babies experience healthy birth outcomes	<ul style="list-style-type: none"> # Babies born at healthy birth weight # Babies born free from addiction # Mothers are being educated on prenatal, infant, and maternal health
	People strengthen mental health and experience recovery from trauma and substance misuse	<ul style="list-style-type: none"> # People that are participating in programs that build coping, problem solving, and critical thinking skills # People that are participating in counseling, recovery support and case management services (pre/post assessments) # Program staff that are trained in trauma informed practices # Youth reporting improved knowledge, attitudes and behaviors with substance misuse as evidenced by pre/post-test assessments
	Older adults maintain independence	<ul style="list-style-type: none"> # Seniors have resources and services needed to remain independent # People reporting improved knowledge and behaviors that improve personal health and wellness
<h2 data-bbox="76 1290 288 1413">COMMUNITY RESILIENCY</h2> <p data-bbox="76 1451 344 1554">Addressing immediate needs today to strengthen the community and prepare for tomorrow</p>	Basic needs are met	<ul style="list-style-type: none"> # People meeting their basic needs (food, clothing, shelter, rental & utility assistance, hygiene) # People accessing food resources that promote healthy eating and improved nutrition.
	People overcome barriers of everyday living so they can contribute to strengthening the community.	<ul style="list-style-type: none"> # People gaining access to reliable transportation # People obtaining safe and stable housing # People securing quality, affordable childcare
	People receive preparation and intervention in emergencies	<ul style="list-style-type: none"> # People that are referred to local support services through the use of 211 WNY # People meeting emergency needs (disaster relief, domestic violence services) # People receiving training on emergency preparedness
<h2 data-bbox="76 1684 389 1740">SELF-SUFFICIENCY</h2> <p data-bbox="76 1778 333 1890">Creating a ready workforce and a stronger financial future for every generation</p>	Individuals are successfully employed	<ul style="list-style-type: none"> # People retaining employment for 6 months or more # At risk employees accessing support services # Young professionals are supported through development and connection opportunities
	Individuals have access to workforce and education opportunities	<ul style="list-style-type: none"> # People receiving job skills training # People increasing soft skills knowledge as measured by pre/post assessment # People receiving literacy and language supports # Minority entrepreneurs supported in business development
	ALICE households increase financial stability	<ul style="list-style-type: none"> # People participating in financial literacy, debt reduction or asset-building programs # People receiving free tax preparation services # Individuals pursuing opportunities for personal and professional advancement

SECTION 2 - FUNDING FRAMEWORK

YOUTH OPPORTUNITY

Helping young people realize their full potential from birth to graduation



Youth Opportunity is influenced by multiple factors: quality early learning, early detection of learning challenges, comprehensive assessments and services that meet the academic, social, and emotional needs of youth, deeper family engagement, and helping to prepare our youth for their next steps into college / career. These all provide a blueprint for the development of our youth, yet many of Chautauqua County's children face barriers in their opportunities. 23% of [families with children](#) in Chautauqua County live below the federal poverty level. In 2020, 27% of Chautauqua County's young adults of color (29% of white young adults) ages 16-24 were [not engaging in work or school](#). Not accessing education and job experience early in life can have long-lasting impacts including lower earnings, worse health, and higher unemployment for youth, and higher public expenditures and lower tax revenue for a county. Chautauqua County is considered a childcare desert with only [44% children](#) enrolled in a quality preschool, a valuable way to jumpstart a child's education. UWCC's goal is to fund interventions and programs that improve opportunities of our youth from birth to graduation, including literacy and math skills, social-emotional and mental health skills, as well as fostering more family engagement in their futures. Every child deserves the chance to reach their full potential. United Way supports programs that create pathways to success from early childhood to graduation.

HEALTH EQUITY

Improving health and well-being for all, especially vulnerable populations



The [COI 2023 Community Needs Assessment](#) highlighted the need for a healthier Chautauqua County with the county ranking 55th out of 62 counties in New York in regards to health outcomes. The UWCC and the programs we fund are committed to supporting the continued improvement of the health and well-being of its local residents, especially our most vulnerable populations. Our growing senior population is especially vulnerable [with 47.8% living alone](#). We are also still feeling the effects of the COVID-19 pandemic that gave rise to an increase in substance misuse and deteriorating mental health in our county. Mental health is just as important as physical health, yet people struggle to get help. [18.9% of adults in Chautauqua County have a serious mental illness, substance use disorder, or both](#). Trauma is often at the core of many of these issues. Focusing on prevention, treatment and long-term solutions is critical. United Way supports programs that improve health, create access, and reduce the impact of trauma, mental health illness and substance misuse.

- > **89%** of youth served increased their social, emotional and mental health skills.*
- > **820** seniors received resources & services needed to remain independent.*
- > **4,769** children served by UW programs are entering school ready to learn.*

*data from the 2022-2023 [UWSCC Collective Impact Report](#)

SECTION 2 - FUNDING FRAMEWORK

COMMUNITY RESILIENCY

Addressing immediate needs today to strengthen the community and prepare for tomorrow



A resilient community is one that is able to easily bounce back from adversity or crises. Meeting basic and emergency needs -- including food, shelter, transportation -- as well as providing the basic tools to prepare for a crisis strengthens a community. People who are at or below the poverty line, or part of the ALICE population are disproportionately affected by these situations. With [18% of households in poverty and 26% considered ALICE](#) households. This means that 44% of all households are not well equipped to both deal with and recover from a crisis or adverse situations. UWCC's goal is to support agencies with programs that can help people overcome barriers to everyday living, meet their basic needs, and help with both emergency preparation and intervention. Healthy food is also one of the foundations of a thriving community. Food insecurity is also prevalent across Chautauqua County with [12.4% that experience some form of food insecurity](#). Child food insecurity is higher, at 15.2% food insecurity rate. Both groups lack access to the necessary resources for a healthy diet. Housing continues to be another one of our county's biggest problem areas. [27% of all houses](#) in Chautauqua County are a concern: incomplete facilities, plumbing, overcrowding, or are cost burdened. Programs in this impact area help people move from basic survival to the building blocks needed to thrive. This results in a stronger and more resilient community.

SELF-SUFFICIENCY

Creating a ready workforce and a stronger financial future for every generation



The United Way strives to create pathways to self-sufficiency, including access to job training, workforce and education opportunities, as well as financial tools that improve financial security. In 2024, [the unemployment rate](#) in Chautauqua County has averaged 4.4% . Statistically, the unemployment rate for people of color has been at least 3% higher. In addition, people of color are more likely to be identified among the [ALICE population](#) with 36% of the Hispanic population and 53% of black families making them less secure financially, compared to 10% of white families. Chautauqua County has also [lost 3% of its employers over the last ten years](#). With jobs leaving the county, it is increasingly difficult to find work that pays a consistent, living wage. Our goal is to help strengthen the workforce and expand job opportunities for the county's residents and to also support small businesses. UWCC strives to accomplish this by funding programs that support job readiness, workforce development, adult education and job training, financial education and coaching,

- **435** households overcame barriers to completing the activities of daily living.*
- **3,971** individuals and families whose basic needs were met for food, clothing & shelter.*
- **175** individuals participated in financial literacy programs to secure savings and reduce debt.*

*data from the 2022-2023 [UWSCC Collective Impact Report](#)

SECTION 3 - APPLICATION QUESTIONS

Pre-Application Requirements:

- 211 profile has been updated, Yes No
- State Employee Federated Appeal (SEFA) created and/or updated. Yes No

ORGANIZATION & PROGRAM SNAPSHOT

Organization Mission Statement (maximum 200 characters)

Brief Program Description (maximum 500 characters / around 7-10 sentences)

Amount Requested for Program (minimum funding request \$7,500)

Identify the Program's Primary Impact Area, Outcome and Indicators (drop down boxes)

Identify the primary impact area in which your program is applying. Some programs may also be collecting data in a secondary impact area; if so, please identify. List the outcome(s) the program will work toward in line with the identified impact area. Identify at least one indicator that will support the identified impact area of the program. More than one indicator may strengthen your application.

Geographic Location(s) of programming: ___Northern ___ Southern ___ County-wide

Comment if needed:

Target Audience: Describe the characteristics of the people the program serves, including risk/protective factors, demographics, unmet needs, etc. Include approximate number of people served in last year.

PROGRAM DESCRIPTION

Program Impact (maximum 5,000 characters)

Provide a brief summary of the main objectives of your program. Explain how the program aligns with the United Way primary impact area and outcomes chosen. How does your program address or meet identified [community needs](#)? Why is your program best suited to meet that need? Identify evidenced-based models/best practices/curriculum that will be used in the program.

Success Story: (maximum 1,000 characters)

Tell us about someone who has been impacted by the program. What factors contributed to their success?

Collaboration (maximum 2,000 characters)

Identify partnerships and collaborations that are intentional and strategic in your program. How does collaboration support meeting participants needs? Explain the flow of responsibilities between your organization and other agencies. Explain how funds and resources are shared to achieve specific outcomes.

Budget Narrative (maximum 2,000 characters)

Tell the story of how United Way funds will be used for the projected program budget. Include in your narrative both revenue (including other funding sources), expenses, and a general explanation for how you arrived at these figures.

SECTION 3 - APPLICATION QUESTIONS

DATA & EVALUATION

Data (maximum 3,000 characters)

Explain the process that will be used to collect data within the program. Identify which tools or assessments will be used to measure the indicators and the frequency of data collection on each program participant.

Evaluation (maximum 2,000 characters)

Describe how outcome and other data collected by the program is analyzed and used to make program improvements.

SUPPORTING QUESTIONS

Equitable Engagement (maximum 2,000 characters)

Describe any agency or program efforts around equitable engagement. What are examples of how you are trying to build trust with marginalized communities?

Anticipated Challenges (maximum 3,000 characters)

Does your agency or program have any anticipated challenges in the next two years? How will these challenges be addressed to support ongoing programming and capacity/stability of the organization?

Additional Support (maximum 1,000 characters)

Aside from funding, in what other ways could United Way support your program (ex. volunteers, trainings, check ins, etc.)? How would receiving support positively impact your organization?

SUPPLEMENTAL DOCUMENTS

Required Supplemental Documents

- Agency of Excellence Checklist *upload fillable pdf
- Program Statistics *upload fillable pdf
- Program Budget *upload fillable pdf
- Agency Budget
- Current Profit & Loss Statement
- Statement of Financial Position/Balance Sheet
- Most Recent Audited Financial Statement/Financial Review (depending on size of org)
- Latest 990 Form

SECTION 3 - APPLICATION QUESTIONS

GUIDELINES FOR SITE VISITS

The site visit is an opportunity for United Way allocations volunteer panels to hear directly from and ask questions of the staff, board members and volunteers of each applicant organization. It also allows them to broaden their knowledge of the program (and the sector). Site visits are generally grouped by strategic impact area to allow volunteers to broaden their knowledge of the impact area. Over time, the volunteer panels will better understand the desired outcomes, best practices, and obstacles. Applying agencies also have the opportunity to highlight unique attributes of their programs that may not have been possible in the written application.

Each site visit will last approximately 45 minutes. The agency should be prepared to present for no longer than 30 minutes and allow the panel about 15 minutes for questions. If an agency has multiple programs that are applying for funding, the **total** time allowed for multiple presentations is 45 minutes, leaving 15-20 minutes for questions at the end.

United Way suggests the following representatives be present for the site visit: the executive director, a member of the board, the fiscal officer/financial manager, and the program director(s). Frontline staff and/or program participants may also attend, if it strengthens the program narrative and impact.

The panel will prepare for presentations by thoroughly reviewing a program's application and accompanying materials. Presentations should focus on broadening the panel's understanding of program elements through supportive details, efforts, and frontline experience with program staff and participants. A portion of the presentation should focus on the program budget. In this section, please discuss grants and indicate those that are secured, pending, or expiring and how this affects the program. Describe the impact your program has on individuals, families, and the community including the role that collaboration plays on overall impact. It is highly recommended that the enclosed scorecard is used in preparation for the presentation.

Phone calls to schedule your site visit will take place between February 25-27, 2025. United Way staff will let the primary program contact know the approximate 30-minute window to expect a phone call to schedule the site visit. They will also provide you with a list of potential questions that may be asked. Site visits occur between **March 3 and May 2**. If your agency/program would like to include a tour for allocation volunteers during the site visit, please indicate when scheduling.

SUPPLEMENTAL UPLOADS

Attached are the AGENCY OF EXCELLENCE CHECKLIST, PROGRAM BUDGET, and PROGRAM STATISTICS documents that will be available as fillable pdfs available in [Chautauqua Grants](#)

AGENCY OF EXCELLENCE CHECKLIST

VISION & ORGANIZATIONAL OPERATIONS

Does your staff, board, and volunteers have a working knowledge of your vision and values and regularly put them into practice?

Yes

No

Does your organization have a consistent plan for internally and externally communicating accomplishments and outcomes?

Yes

No

Was your organization able to make some investments in your facility, technology, or systems last year?

Yes

No

LEADERSHIP & TALENT

Does your organization provide opportunities for professional development?

Yes

No

Did your staff have performance reviews last year?

Yes

No

BOARD GOVERNANCE

How often does your Board of Directors meet?

_____ times per year

Did the Executive Director have a performance evaluation in the prior year?

Yes

No

Did the Board and Executive Director use a formal process to determine if the organization accomplished its goals in the prior year?

Yes

No

FINANCE

Clean opinion rendered by Auditor

Yes

No

Functional Expenses:

Program: _____%

Management & General: _____%

Fundraising: _____%

How often does the board review the organization's finances?

_____ times per year

RESOURCE DEVELOPMENT

Does the organization conduct its own fundraisers?

Yes

No

If yes, % of gross income:

_____ %

Does the organization receive any grants that are ending soon or at risk for reduction?

Yes

No

INCLUSION, DIVERSITY, EQUITY & ACCESSIBILITY (I.D.E.A.)

Does your organization have a diversity, equity, and inclusion statement?

Yes

No

If yes, please include. If you have previously applied and submitted this statement in the past, it is not necessary to attach.

Has your organization taken part in DEI, cultural competency, etc. training?

Yes

No

Does your organization have materials (intake forms, website, etc) available in Spanish?

Yes

No

What is the approximate percentage of your staff who are people of color?

0%

between
0% and 10%

between
10% and 25%

between
25% and 50%

over 50%

What is the approximate percentage of your board of directors who are people of color?

0%

between
0% and 10%

between
10% and 25%

between
25% and 50%

over 50 %

PROGRAM STATISTICS

Program Name:

Predicted number of individuals served next year:

Cost per individual or family:

(ex: total prior year program expenses / total served = cost per individual)

Program Statistics (Estimated %)	Prior Year (%)	Current Year (%)
Race & Ethnicity:		
White		
Black or African American		
Hispanic or Latino		
Asian		
Native Hawaiian or Other Pacific Islander		
American Indian or Alaska Native		
Multi-racial		
Preferred not to identify		
Age:		
0-4		
5-18		
19-25		
26-61		
62+		
Gender:		
Man		
Woman		
Non-binary		
Prefer to self identify		
Prefer not to answer		
Socio-economic Population Served (May be estimated. Please comment if this is a challenge for your program)		
Households in Poverty		
ALICE Households (employed)		
Middle Class +		

Comment:

PROGRAM BUDGET

Agency:

Program Name:

Cost per individual or family:
(Based on prior year program budget and numbers served)

What are the dates of your fiscal year?

Public Support and Revenue	Prior Year (Actuals)	Current Year Budget

Total Public Support and Revenue

--	--

Expenses	Prior Year (Actuals)	Current Year Budget

Total Expenses

--	--

Surplus (Deficit)

--	--

SECTION 4 - EVALUATION & REPORTING

PROGRAM SCORECARD

All requests for funding will be evaluated using this scorecard. Please note that some criteria are weighted more highly than others as indicated in the shaded areas. Other considerations taken into account when evaluating applications include whether the program addresses a gap in services/support and what the highest and best use of donor dollars is in the community.

UNITED WAY 2025-2027 FUNDING CYCLE SCORECARD					United Way United Ways of Chautauqua County
AGENCY:		PRIMARY IMPACT AREA:		OUTCOME:	
PROGRAM NAME:		<input type="checkbox"/> Youth Opportunity <input type="checkbox"/> Community Resiliency		_____	
CURRENT FUNDING \$		<input type="checkbox"/> Health <input type="checkbox"/> Self-Sufficiency		_____	
SCORE:					
Criteria	Model for others (9)	Meeting expectations (3)	In Development (1)	Insufficient / Not Apparent (0)	Notes:
Program description clearly defines what, how, when, where and for whom.					
Program is well designed (evidence based, best practices cited, rationale included).					
Program is responsive, relevant, and effective in addressing community needs.					
Program demonstrates commitment to diversity, equity, inclusion, and accessibility.					
Program cites specific examples of both collaboration and coordination with other agencies as well as key stakeholders throughout the community.					
Evaluation and data collection processes are well-defined and used to improve program impact.					
Program budget is clear. It is evident how UW funds are efficiently used to achieve program objectives.					
Capacity and stability of the organization, including leadership, staff, operations, financials, etc.					
Criteria is important but less weighted in the final score = 1x			Criteria is very important and more weighted in the final score = 2x		

INTERIM REPORTING REQUIREMENTS

During the preparation of this proposal, the applicant will identify **one strategic impact area, at least one outcome** and **at least one indicator** from the Funding Framework on page 8 . Data reports submitted will come directly from where the program self-identified (more than one may be chosen). These reports will be submitted through the [Chautauqua Grants](#) website at six-month intervals. Below is the list of interim reporting requirements that will be found on the Chautauqua Grants website. Although the specific narrative questions may change, most reports will include some variation on the following:

- **Program Data Report** (within funding framework) - some indicators may ask for disaggregated data.
- **Data Narrative** - Includes additional indicators or data you are collecting beyond the program data report, as well as a narrative that tells the story and impact of the data measured.
- **Challenges, Successes or Findings** - Summary of program challenges, findings, and successes in reporting period. We may occasionally ask for stories and testimonials to show program impact.
- **Collaboration** - Intentional, strategic collaboration measures and impact.

RESOURCES

ALICE Data (Asset-Limited, Income-Constrained, Employed)

<https://www.unitedforalice.org/new-york>

Chautauqua County Community Health Assessment and Community Health Improvement Plan 2022-2024

https://chqgov.com/sites/default/files/document-files/2023-01/CHQ.CHA_2022.Final_.pdf

Chautauqua County Education Data

<https://data.nysed.gov/profile.php?county=06>

Chautauqua Opportunities, Inc. 2023 Community Needs Assessment

<https://www.chautauquaopportunities.com/wp-content/uploads/2023/01/CNA-2023-1.5-links-fixed.pdf>

Community Resilience Estimates for Equity and Disasters

<https://experience.arcgis.com/experience/76f53fb6758b49dc87ef47687f9476cf>

Health Data

https://www.health.ny.gov/prevention/prevention_agenda/indicators/county/chautauqua.htm

National Equity Atlas

<https://nationalequityatlas.org/>

KEY TERMS

Allocations - The process that the United Way utilizes to distribute money raised through its current fundraising campaign to partner agencies.

Asset Limited, Income Constrained, Employed (ALICE) - Individuals/households who work and their income(s) are above the federal poverty level, but not high enough to afford essentials in the communities where they live. Please visit [United for ALICE](https://www.unitedforalice.org/) for more information.

Blackout Period - A period of time wherein community partners may not conduct fundraising activities or direct mail appeals. This period typically falls between September 1st to last through mid November. Exceptions can be requested via a supplemental fundraising form. Please email erinaldo@uwayscc.org for the form.

Community Needs Assessment - A comprehensive report assembled by Chautauqua Opportunities for the purpose of identifying areas of weakness and strength within our community.

KEY TERMS

Community Partners - Organizations who collaborate with the United Way to advance shared goals, support mutual interests, and serve the community more effectively (sharing resources, expertise, or networks).

Cultural Competency - The ability to understand, respect, and effectively interact with people from different cultural backgrounds. It involves acquiring the knowledge, skills, attitudes, and behaviors necessary to work effectively in cross-cultural situations, recognizing and valuing cultural differences, and adapting one's approach to meet the needs of diverse groups.

DEI - Diversity, Equity, and Inclusion, a framework and set of principles aimed at fostering environments where all individuals feel valued, respected, and supported, regardless of their background, identity, or experiences.

Developmental Milestones - Key skills or behaviors that most children can do at a specific age range as they grow and develop. These milestones mark the typical progress in various areas of a child's physical, cognitive, emotional, and social development. Monitoring these milestones helps to assess whether a child is developing in a typical manner or if there may be concerns about delays or disorders that require intervention.

Equitable Engagement - Equitable Engagement strives to intentionally develop and employ systems and processes to engage traditionally marginalized members of the community - including people of color, veterans, people experiencing homelessness, people with disabilities, indigenous populations, immigrants and refugees, the prison re-entry population, seniors, youth, and low-income residents.

- Why is [Equitable Engagement](#) important?
 - To hear and incorporate diverse perspectives into decision making
 - To ensure programs benefit all eligible community members
 - To restore, maintain, or build trust
 - To establish or enhance two-way communication

Evidence Based - Refers to a process or approach that relies on the use of empirical data, research, or documented experiences to support conclusions and actions. It involves evaluating and integrating the best available evidence, such as scientific studies, real world observations, and expert insights. This is to ensure that decisions are grounded in reliable, tested information rather than assumptions or unverified opinions.

Food Insecurity - The condition in which individuals or households are unable to access or afford enough nutritious and safe food for an active and healthy life.

Funding Focus - These are the four areas in which the UWCC has identified as key areas within our community and are used to guide outcomes and the allocations process: Youth Opportunity, Health, Community Resilience, and Self-Sufficiency.

KEY TERMS

I.D.E.A. – The abbreviation for Inclusion, Diversity, Equity and Accessibility. Inclusion being the state that involves a sense of belonging, empowerment, and authentic participation within a group or community. Diversity being a state of being that encompasses all the way that people differ, considering all the different characteristics that make one individual or group different from another. Equity being the state, quality, or ideal of being just, impartial, and fair in trying to understand and give people what they need to enjoy full, healthy lives. Accessible being the quality of being able to be reached, entered, approached, spoken with, or used. Visit the [United Way Worldwide Equity Framework](#) for more information.

Narrative Report - A detailed, descriptive document that outlines the activities, progress, and outcomes of a specific program, project, or initiative. These tell the stories behind the work and explain what was done and the impact it had on the community or individuals being served.

Resiliency - The ability to withstand, adapt to, and recover from challenges, adversity, or stress. The strength of a community, organizations or systems to bounce back after difficult or unexpected situations.

RFP - Request for Proposal - This is a document published by the United Way of Chautauqua County that is used to invite nonprofit organizations to submit detailed plans and requests for funding to address community needs or undertake initiatives that align with the United Way mission.

Roundtable Meetings - Quarterly meetings attended by community partner agencies. These meetings serve as a means of communicating news, updates and are a way for agencies to create and foster intra agency relationships and collaborations.

SEFA - State Employee Federated Appeal (SEFA) is the solicitation of State employees in their workplaces on behalf of approved charities, authorized through NY State Law and Regulations and supported by labor and management. Through SEFA, state employees can support charities of their choice through a single pledge, easily paid through payroll deduction or by check. www.sefanys.org
Applications should be open Dec. 15th, but the SEFA team at Central NY was still working on the process as of last Wednesday. Hopefully, the details will be ready before our Roundtables.

Socioemotional - The ability to understand, express, and manage emotions, as well as the ability to develop and maintain relationships with others. Social and emotional growth is a key indicator of youth development.

Substance Misuse - The change from ‘abuse’ to ‘misuse’ was done to reduce the negative stigma around the word ‘abuse’ which brings with it a negative connotation that can contribute to feelings of shame and guilt for those that struggle with substance use.

Sufficiency - Having enough of something to meet a need or fulfill a purpose without excess. It is having adequate resources, qualities, or conditions that are just right to achieve an intended outcome.

Trauma Informed Practices - Refers to approaches, strategies, and systems that recognize and respond to the impact of trauma on individuals, with an emphasis on safety, empowerment, trustworthiness, and transparency. This creates an environment where individuals feel safe, respected, and supported in their journey toward recovery or coping.

Is there a requirement for organization size or budget to apply?

- There are no organizational size or budget requirements for application.

When are my applications due?

- Applications are due by January 31st, 2025

If my organization has received a United Way Grant in the past, are we allowed to apply again?

- Yes. If you are unsure where your program fits within our new investment priorities, please reach out to UWCC staff with questions: 716-483-1561

Do we need to use all the characters available in each answer field?

- No, our character limits are set to ensure that you have sufficient space to answer the question. If you can answer the question in fewer characters, please do so.

I want to seek out someone who could guide me through this application process, what do I do?

- We have a group of retired Executive Directors who are willing to serve as coaches, mentors, and may help you review your application. United Way staff can also provide some support and guidance. If you are interested in receiving this kind of support, please fill out the following form: [Click here for form](#) or use the QR code at right.



I don't know how to choose outcomes or indicators. What do I do?

- Ask yourself: What is the mission of this program? What do I expect my program participants to have when they exit the program? What goals are you trying to achieve? What will I be able to measure?
- Use our "Funding Framework" on page 8 to help pin point where your program fits.

How will applications be evaluated?

- Applications for funding will be evaluated through the allocations process and funding decisions are ultimately made by allocations volunteers from the community. The allocations process consists of your full application and additional uploads (990s, budgets, etc); a site visit by allocations volunteers where you will briefly present about your program and volunteers can ask questions; and a scorecard that contains the criteria that each panel will use to evaluate your program. Funding decisions are not tied directly to your score, but this is one of many tools they will use to evaluate whether your program will be funded, and at what level.

What are some tips for a strong application?

- Take your time and answer each question as fully and as honestly as you can. Narrative stories go a long way in helping to paint a picture of your program's impact. Have clear and focused objectives for your program and ensure that it has a clear connection to the funding framework. Also, ensure your agency has a way to consistently and accurately track data. Data is one of the ways agencies can measure success, and provides a tool for making improvements.

What are the key milestones and deadlines my agency should be aware of throughout the application cycle?

- See page 5 of this RFP for all important dates.

I have received a grant / funding, how do I access the grant portal to submit my report?

- The grant portal can be accessed here: <https://www.chautauquagrants.org/>
- If you need help accessing your agency's account, please contact Eric Rinaldo at erinaldo@uwayscc.org