

United Way of Chautauqua County
Community Partner Roundtable
RFP 2025-2027 Information Session
12/12/2024
Conducted via Zoom due to inclement weather
AI SUMMARY

Quick recap

- The United Way of Chautauqua County held a Quarterly Roundtable meeting to discuss their funding process, campaign progress, and upcoming events.
- The team reviewed the updated funding framework, application process for grants, and the importance of data collection and measurement in evaluating programs.
- They also explored the use of AI in grant applications and introduced new initiatives, including a co-working space for nonprofits and participation in the State Employee Federated Appeal campaign.

Summary of Next Steps

- All agencies review the United Way Request for Proposal (RFP) document in detail.
- Agencies update their 211 profile before applying for United Way funding.
- Agencies to create/update their SEFA (State Employees Federated Appeal) profile starting December 15th.
- Agencies prepare required supplemental uploads for the funding application, including audited financials, 990 form, and program budget.
- Eric to send emails in early January with Google form for agencies to provide blackout dates for site visits.
- **Agencies submit completed funding applications through Chautauqua Grants by January 31st, 2024.**
- **Currently funded agencies submit interim data reports for July-December 2024 by January 31st, 2024.**
- Agencies to be available for potential phone calls during February 25-27, 2024, to schedule site visits. We will reach out with specific dates and times so you can plan accordingly.
- Katie will send an email when tickets for the January 30th Capacity Lab Mini Conference become available.
- Agencies that are interested in using the new Dunkirk office co-working space to watch for scheduling tool information in early January.

- Lisa to update SEFA application process information once the system opens on December 15th.
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Roundtable Summary

United Way Quarterly Roundtable Meeting

In the meeting, Amy Rohler, the executive director of United Way of Chautauqua County, introduced the quarterly roundtable and the new RFP and funding process.

Lisa Sunday, the Director of Finance, and Dan Siracuse, the Community Relations Coordinator, introduced themselves. Katie Castro, the Director of Advancement, and Eric Rinaldo, the Community Impact Manager, also joined the meeting. The team then went around the room for introductions, with each participant sharing their name, organization, role, and holiday plans. The conversation ended with Katie announcing some general announcements of interest to the team.

United Way Campaign Progress and Events

- Katie announced that the United Way campaign is at 62% of its ambitious goal of 1.8 million dollars, expressing gratitude to all participants.
- Melanie from Prevention Works praised the increased visibility of the campaign, particularly in the northern counties.
- Amy mentioned a successful workplace campaign at Jamestown Plastics, a first for the company.
- Katie then introduced the upcoming Capacity Lab Sponsored "Back Office Boost" conference on January 30th, focusing on organizational culture, HR, financial management, and AI in nonprofits.
- Amy encouraged everyone to follow the Facebook page of Jamestown Young Professionals, a United Way-supported organization, and to consider whether their organization might be a good fit for the VITA (Volunteer Income Tax Assistance) program volunteers to do their employees' taxes for free. An informational flier will be distributed.

United Way Funding Framework Discussed

- Amy discussed the United Way's funding framework, which has been outcome-based since 2014. She emphasized the importance of agencies being able to locate themselves in one of four strategic impact areas: youth opportunity; health equity; community resiliency, and self-sufficiency.
- Amy also highlighted the need for agencies to report data and maintain an up to date 2-1-1 profile. She introduced a new requirement for agencies to update and maintain a profile in CIFA, the State employee Federated Appeal campaign.

- Amy also mentioned a **'blackout period'** between **September 1st and November 15th**, during which agencies are asked not to conduct fundraising activities.

Funding Application and Site Visit Process

- Amy and Eric discussed the upcoming application deadline for funding and the interim data report due from current funded community partners (January 31st, 2025).
- They also outlined the process for the site visits, which will take place between March 3rd and May 2nd, and emphasized the importance of being available during the allocation process orientation and scheduling process that takes place between February 25-27.
- Eric explained the role of the allocation volunteers, who come from various sectors and backgrounds, and how they make funding decisions after site visits and discussions.
- Amy added that the scorecard used in the process is not directly tied to funding decisions, and that the final decisions are made collectively after considering various factors.
- The conversation ended with a discussion on the funding framework and the importance of community-level data.

Updated Funding Framework and Data

- Amy discussed the updated funding framework for community impact, which now includes strategic impact areas such as youth opportunity, health equity, community resiliency, and self-sufficiency. She emphasized that most outcomes have not changed, but the language and categorization have been updated.
- Amy also highlighted the importance of data collection and measurement, as indicated by the funding framework's indicators. She encouraged the team to assess whether they can measure the outcomes and to reach out to Eric for assistance if needed.

Chautauqua Grants Application Process

- Eric and Amy discussed the application process for Chautauqua Grants, emphasizing the importance of providing a narrative of the program's impact and budget.
- They highlighted the need for applicants to provide a budget narrative, explaining how the budget supports the program and its activities. They also stressed the significance of data collection and its use in driving improvements and communicating program effectiveness.
- Amy offered to provide examples of good budget narratives and encouraged applicants to reach out if they had questions.

Chautauqua Grants Application and Evaluation

- Amy and Eric discussed the process of applying for grants through Chautauqua Grants. They clarified that agencies could use their current account and that they need to be listed as a primary contact on their agency's profile.
- They also explained the supplemental uploads required for the application, including an agency of excellence checklist, program statistics, and a program budget.

- Amy emphasized the importance of providing accurate and up-to-date financial information.
- They also discussed the scorecard used for evaluating programs, which provide feedback and suggestions for improvement.
- Eric offered to assist with any difficulties in navigating the Chautauqua Grants system.

AI in Grant Applications and Education

- Amy discussed the use of AI in grant applications, emphasizing its potential benefits and limitations.
- She suggested that AI could be a useful tool for improving grammar and spelling but cautioned that it might not be able to fully write grant applications.
- Amy also highlighted the importance of site visits for understanding the impact of programs.
- Stephanie shared her experience using AI tools like Otter, Grammarly, and ChatGPT, emphasizing their efficiency for small organizations. She also stressed the need for transparency and proper use of AI tools.
- Melanie expressed concerns about the impact of AI on youth communication skills.
- The team agreed on the need for education and transparency in using AI tools.
- Lisa was set to discuss SEFA, a new system for grant applications.

SEFA Campaign and United Way Updates

- Lisa discussed the State Employee Federated Appeal (SEFA) campaign, which is the United Way campaign for payroll deductions for state employees.
- She explained that the campaign is governed by New York State law and that all charities must adhere to these laws.
- Lisa also outlined the process for new agencies to apply for participation in the SEFA campaign, which includes a vendor rep certification and an anti-terrorism compliance form.
- Amy added that the application period for new agencies opens on December 15th and that the United Way will provide support and advice throughout the process.
- Katie announced an exciting development at the United Way's Dunkirk office, where they are dedicating additional space for co-working for nonprofits in the community. The space will include two permanent cubicles for leasing and a flex space available on a first-come, first-served basis.