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Funding Process Meeting

November 7, 2023

Pocono Mountains
United Way



Agenda

- I. Welcome and Introductions
- II. FY 2024-2025 Priority Needs
- III. Priority Considerations
- IV. Overview of Funding Process
- V. Online Application Portal
- VI. Common Application Errors
- VII. NEW! Performance Measures (Outcomes) Section
- VIII. Centering Equity in Resource Investment
- IX. Questions and Answers

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Welcome and Introductions



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Mission and Vision

Mission: Pocono Mountains United Way engages and mobilizes resources to improve lives through accelerated community change.

Vision: A community where everyone has ample opportunities for quality education, good health, and financial stability.

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FY 2024-2025 Priority Needs



Education



Financial
Mobility



Health

FY 2024-2025 Priority Needs

- Mental Health



- Innovative solutions including self-help, social support and prevention of mental health disorders

- Basic Needs



- Food
- Utilities
- Healthcare
- Technology Access
- Transportation

FY 2024-2025 Priority Needs

- Childcare



- Domestic Violence




- Housing



- Rental assistance, housing/eviction counseling, financial counseling/coaching
- Other innovative approaches to stabilizing renters
- Assistance for people experiencing homelessness
- Addressing at-risk homeowners

FY 2024-2025 Priority Needs

- Barriers to work 
 - Including novel approaches to assist people in returning to work

FY 2024-2025 Priority Considerations

- Address ALICE population
 - Benefits cliffs
 - Expansion of programs to serve up to the ALICE Survival Threshold or ALICE Stability Threshold
- Address disproportionate impacts on People of Color and Socially Disadvantaged households
- Address disproportionate impacts on women

Overview of Funding Process

January 1, 2024	Application for FY 2024-2025 funding opens
January 31, 2024	Applications due
February 2024	Financial Review Panel meetings
March-April 2024	Program Review Panel Meetings and Site Visits
Late May 2024	PMUW Board of Directors approves panel funding recommendations
Early June 2024	Funding announcements made
August 2024	First quarterly payments made
August 15, 2024	FY 2023-2024 End of Year Reports due
January 2025	FY 2024-2025 Mid-Year Reports due
August 15, 2025	FY 2024-2025 End of Year Reports due

Overview of Funding Process

- For FY 2024-2025, any nonprofit serving Monroe County may apply for funding
- Eligibility criteria apply, see [Request for Applications](#) (RFA) for full details
 - RFA will be released December 1, 2023
 - See PoconoUnitedWay.org

Overview of Funding Process

- Volunteers from our community work on panels to conduct reviews
 - Financial Reviews
 - Program Reviews
- The Resource Investment Committee makes funding recommendations to the Board of Directors
- Board of Directors approves total available dollars and final funding amounts for each program

Overview of Funding Process

- “Hybrid Site Visit” Model
 - Approximately 1/3 of funded agencies will have an in-person meeting each year
 - Remaining agencies will be reviewed by panels alone; questions will be directed to agencies with time for response before final recommendations are made
 - If site visits are not possible or your agency has particular restrictions in place, please note that in the application

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Online Grant Portal



e-CImpact

Access at

agency.e-cimpact.com/login.aspx?org=40570U

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Online Grant Portal



Agency Training Manual [Available Here](#)

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Online Grant Portal

Monroe County, Pennsylvania
Health and Human Services Grant Portal

HOSTED BY:

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MONROE COUNTY, PA HEALTH AND HUMAN SERVICES GRANT PORTAL

Sign-In

Please sign in to your account.

Sign in to our Secure Server

[Forgot your password?](#)

Returning users sign in
here

New to e-Clmpact?

Create a Monroe County, PA Health & Human Services Grant Portal account

To create a new account select the link below:

Click here to create a new Monroe County, PA Health & Human Services Grant Portal account

New users create an
account here

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Online Grant Portal

Agency Information

Only required once per agency

- Agency Status
- Agency Budget
- Agency Fiscal Abstract
- PATRIOT Act Information
- Demographic Information

Program Information

Required for each program requesting funding

- Program Overview
- Program Budget
- Program Budget Narrative
- Program Success Story
- “What a Dollar Buys”
- Performance Measures (Outcomes and Outputs)

Online Grant Portal

Required Attachments

- IRS Tax-Exempt Determination Letter
- Most Recent Annual Report
- IRS Form 990 or 990 E
- Financial Audit or Review
- Current Certificate of Registration from Department of State, Bureau of Charitable Organizations
- Board of Directors Roster
- Agency Organizational Chart
- Agency Non-Discrimination and Conflict of Interest Policies

Online Grant Portal

When completing the application, keep Priority Considerations in mind:

- ✓ Address ALICE population
- ✓ Address disproportionate impacts on People of Color and Socially Disadvantaged households
- ✓ Address disproportionate impacts on women

Common Errors: Agency Application

- Please be sure to provide the correct budget type:
 - Agency Budget (also called Operating Budget)*
 - Refers to the budget for the entire organization
 - Program Budget
 - Refers to the budget only for the specific program/portion of agency activities seeking funding
 - Grant Budget – **this is not requested by PMUW**
 - Refers to the budget showing only how grant funds will be expended

*we are aware that a few agencies consider the entire organization one program, they will provide the same numbers for Agency and Program Budgets

Common Errors: Agency Application

- Agency Budget
 - Line f should include funding received from Pocono Mountains United Way (prior year budget/actual) and funding requested (current budget)
 - We recognize that if the full requested amount is not received, it will change the current budget figures
 - However, if no funds are shown, would appear that PMUW funding will create a surplus
 - Check the last line for accurate Surplus/Deficit
 - Volunteers do look at that information and will question large amounts in either direction

Common Errors: Agency Application

- Agency Fiscal Abstract – Key Financial Information
 - Accurately calculate overhead rate
 - Refer to Part IX – Statement of Functional Expenses
 - Add amounts on Line 25, Column C (Management and General) and Column D (Fundraising Expenses)
 - Divide by Line 25, Column A (Total Expenses)

Common Errors: Agency Application

- Client/Staff/Board Demographics
 - All fields are OPTIONAL
 - Review volunteers will not see this form and these numbers are not considered in funding decisions
 - You may enter as much information as you have, or utilize the "Unknown/Not Reported" line
 - PMUW is interested in assessing how much information is currently collected by agencies for planning purposes only

Common Errors: Agency Supporting Documents

- Ensure all documents are current
- Please contact PMUW staff if newer versions are expected after application due date

Common Errors: Agency Supporting Documents

- Example Document – IRS Tax Exempt Status Determination Letter

 **IRS** Department of the Treasury
Internal Revenue Service
P.O. Box 2508, Room 4010
Cincinnati OH 45201

In reply refer to: 4077383720
Dec. 02, 2019 LTR 4168C 0
24-0797026 000000 00
00025001
BODC: TE

POCONO MOUNTAINS UNITED WAY
301 MCCONNELL ST
STROUDSBURG PA 18360-2577


017691

Employer ID number: 24-0797026
Form 990 required: Yes

Dear Taxpayer:

We're responding to your request dated Oct. 23, 2019, about your tax-exempt status.

We issued you a determination letter in January 1951, recognizing you as tax-exempt under Internal Revenue Code (IRC) Section 501(c)(3).

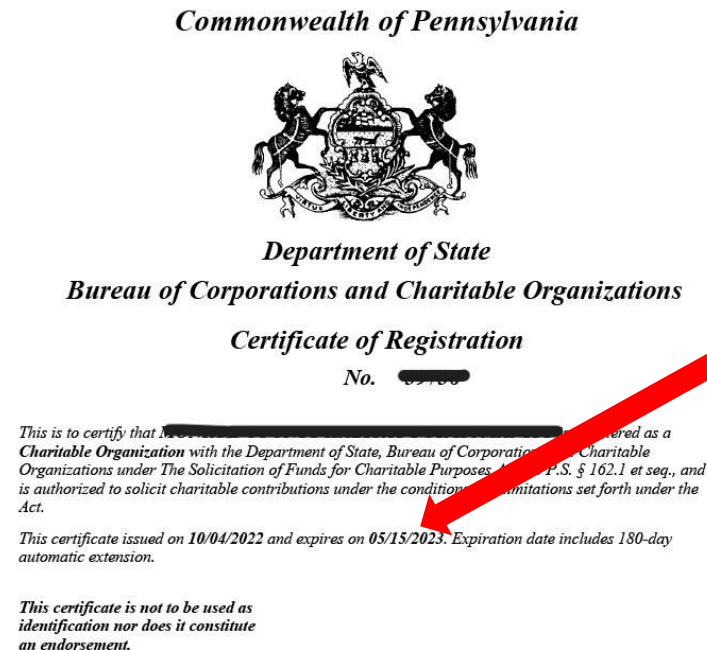
We also show you're not a private foundation as defined under IRC Section 509(a) because you're described in IRC Sections 509(a)(1) and 170(b)(1)(A)(vi).

Donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106, and 2522.

In the heading of this letter, we indicated whether you must file an annual information return. If you're required to file a return, you must file one of the following by the 15th day of the 5th month after

Common Errors: Agency Supporting Documents

- Example Document – Certificate of Registration – PA Dept. of State, Bureau of Charitable Organizations (BCO)



Ensure the dates on your certificate are still valid!

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Common Errors: Agency Supporting Documents

- Example Document – IRS 990 or 990 EZ Form

Form **990** **Return of Organization Exempt From Income Tax** OMB No. 1545-0047
2022
Open to Public Inspection

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)
Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990 for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

A For the 2022 calendar year, or tax year beginning , 2022, and ending , 20

B Check if applicable:
☐ Address change
☐ Name change
☐ Initial return
☐ Final return/terminated
☐ Amended return
☐ Application pending

C Name of organization
Doing business as
Number and street (or P.O. box if mail is not delivered to street address) Room/suite
City or town, state or province, country, and ZIP or foreign postal code

D Employer identification number
E Telephone number
F Name and address of principal officer:
G Gross receipts \$

H(a) Is this a group return for subordinates? ☐ Yes ☐ No
H(b) Are all subordinates included? ☐ Yes ☐ No
If "No," attach a list. See instructions.
H(c) Group exemption number

I Tax-exempt status: ☐ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527

J Website:

K Form of organization: ☐ Corporation ☐ Trust ☐ Association ☐ Other

L Year of formation: **M** State of legal domicile:

Part I Summary

1 Briefly describe the organization's mission or most significant activities:

2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets.

3 Number of voting members of the governing body (Part VI, line 1a) **3**

4 Number of independent voting members of the governing body (Part VI, line 1b) **4**

5 Total number of individuals employed in calendar year 2022 (Part V, line 2a) **5**

6 Total number of volunteers (estimate if necessary) **6**

7a Total unrelated business revenue from Part VIII, column (C), line 12 **7a**

b Net unrelated business taxable income from Form 990-T, Part I, line 11 **7b**

8 Contributions and grants (Part VIII, line 1h)

9 Program service revenue (Part VIII, line 2g)

10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)

11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)

12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)

13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)

14 Benefits paid to or for members (Part IX, column (A), line 4)

15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)

16a Professional fundraising fees (Part IX, column (A), line 11e)

b Total fundraising expenses (Part IX, column (D), line 25)

17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)

Form **990-EZ** **Short Form** **Return of Organization Exempt From Income Tax** OMB No. 1545-0047
2022
Open to Public Inspection

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Do not enter social security numbers on this form, as it may be made public.
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Department of the Treasury
Internal Revenue Service

A For the 2022 calendar year, or tax year beginning , 2022, and ending , 20

B Check if applicable:
☐ Address change
☐ Name change
☐ Initial return
☐ Final return/terminated
☐ Amended return
☐ Application pending

C Name of organization
Number and street (or P.O. box if mail is not delivered to street address) Room/suite
City or town, state or province, country, and ZIP or foreign postal code

D Employer identification number
E Telephone number
F Group Exemption Number

G Accounting Method: ☐ Cash ☐ Accrual Other (specify):

H Check ☐ if the organization is not required to attach Schedule B (Form 990).

I Website:

J Tax-exempt status (check only one) — ☐ 501(c)(3) ☐ 501(c) () (insert no.) ☐ 4947(a)(1) or ☐ 527

K Form of organization: ☐ Corporation ☐ Trust ☐ Association ☐ Other:

L Add lines 5b, 6c, and 7b to line 9 to determine gross receipts. If gross receipts are \$200,000 or more, or if total assets (Part II, column (B)) are \$500,000 or more, file Form 990 instead of Form 990-EZ . \$

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (see the instructions for Part I) ☐

Check if the organization used Schedule O to respond to any question in this Part I ☐

1 Contributions, gifts, grants, and similar amounts received

2 Program service revenue including government fees and contracts

3 Membership dues and assessments

4 Investment income

5a Gross amount from sale of assets other than inventory

5b Less: cost or other basis and sales expenses

5c Gain or (loss) from sale of assets other than inventory (subtract line 5b from line 5a)

6 Gaming and fundraising events:

a Gross income from gaming (attach Schedule G if greater than \$15,000)

6a

b Gross income from fundraising events (not including \$ of contributions from fundraising events reported on line 1) (attach Schedule G if the sum of such gross income and contributions exceeds \$15,000)

6b

c Less: direct expenses from gaming and fundraising events

6c

d Net income or (loss) from gaming and fundraising events (add lines 6a and 6b and subtract line 6c)

6d

Common Errors: Program Application

- Program Overview
 - Keep descriptions short and relevant to the program you are requesting funds for
 - Budget Information
 - Accurately calculate amount of funds requested as a percentage of program budget (not agency budget)
 - Divide PMUW request by total program expenses

Common Errors: Program Application

- Program Budget
 - List full amount being requested from PMUW on Line D under Income
 - Verify surplus/deficit is accurate at the bottom of the budget
 - If a large surplus or deficit is shown, please provide context in the Program Budget Narrative section

NEW! Performance Measures (Outcomes) Section

- This section has been re-designed
- Agencies are able to "write in" their own outcomes or use standard outcomes ([click here for list](#))
 - If using standard outcomes, please consider if they accurately represent the change in participant status that your program seeks to accomplish
- The outcomes you report on should ultimately answer the question...

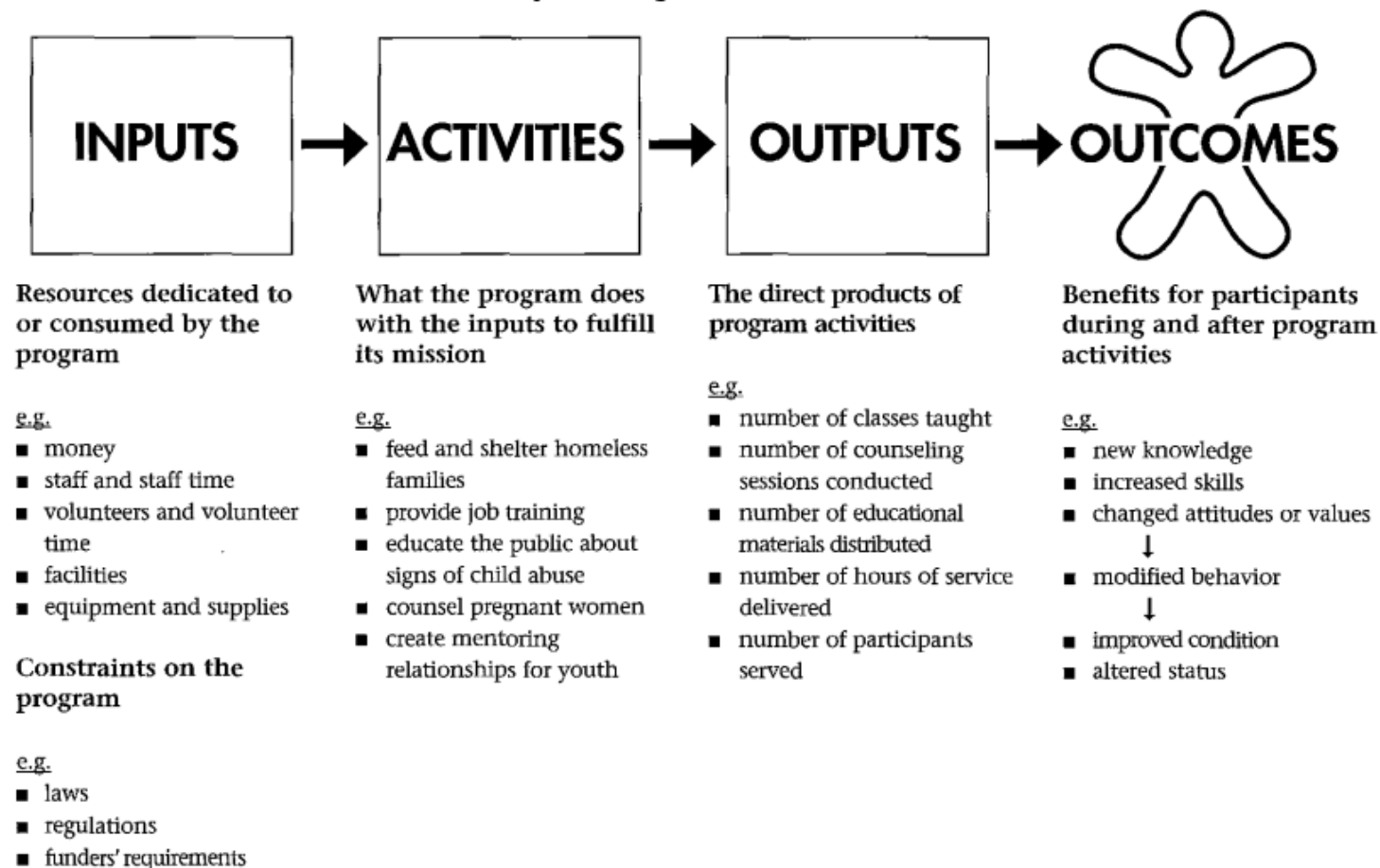
**"Are participants better off after receiving the service
than they were before?"**

NEW! Performance Measures (Outcomes) Section

- 1-2 solid outcomes are fine
 - We understand that it can be a process to determine and track outcomes
 - Our goal is to better capture the impact that PMUW dollars make in the community
- Remember technical assistance is available!
 - Contact Maria or Sarah for assistance

NEW! Performance Measures (Outcomes) Section

Summary of Program Outcome Model



Performance Measures Section - How to Enter

Inputs

+ [Create a New Input - i.e. resources dedicated to or consumed by the program](#)

Activities

+ [Create a New Activity - i.e. what the program does with the inputs to fulfill its mission](#)

Outputs

+ [Create a New Output - i.e. the direct products of the program activities](#)

Outcomes

+ [Create a New Outcome - i.e. benefits for participants during or after program activities](#)

 [View Diagram](#)

 [Return to Overview Page](#)

[View Printable Version](#) 

Performance Measures - Adding Inputs

Inputs > Add New

Input - i.e. resources dedicated to or consumed by the program:*

Step 1 – enter input text

Limit up to 2000 characters (0 used).

[+ Save My Work and Add Another Input - i.e. resources dedicated to or consumed by the program](#)

[Save My Work and Close This Window](#)

[Close This Window](#)

Step 2 – click "Save My Work" and Add Another Input OR
Close This Window as appropriate

Inputs		
+ Create a New Input - i.e. resources dedicated to or consumed by the program		
Staff	Edit	Delete
Case management software	Edit	Delete
Day center space	Edit	Delete

Once done, your
inputs will appear on
the main screen

Performance Measures Section - Adding Activities

Activities > Add New

Activity - i.e. what the program does with the inputs to fulfill its mission:*

Step 1 – enter activities text

Limit up to 2000 characters (0 used).

+ [Save My Work and Add Another Activity - i.e. what the program does with the inputs to fulfill its mission](#)

 [Save My Work and Close This Window](#)

 [Close This Window](#)

Step 2 – click "Save My Work" and Add Another Activity OR
Close This Window as appropriate

Activities

+ [Create a New Activity - i.e. what the program does with the inputs to fulfill its mission](#)

Assess and enroll people experiencing homelessness into Coordinated Entry System upon intake into the program

 [Edit](#)

 [Delete](#)

Provide people experiencing homelessness with case management services

 [Edit](#)

 [Delete](#)

Once done, your
activities will appear
on the main screen

Performance Measures Section - Adding Outputs

Outputs > Add New

Output - i.e. the direct products of the program activities:*

Step 1 – enter output text

Limit up to 2000 characters (0 used).

[Save My Work and Continue](#)

Step 2 – click "Save My Work and Continue" and you will be directed to the next screen

[Close This Window](#)

Outputs > Update

! This item is NOT Ready To Submit, please complete any required fields (marked with an asterisk*) and then click the 'Save My Work and Mark as Completed' button.

Output - i.e. the direct products of the program activities:*

Individuals will complete Coordinated Entry assessments to increase access to safe and affordable housing and shelter.

Limit up to 2000 characters (118 used).

Number*

Projected	Mid-Year	End of Year
<input type="text"/>		

Step 3 – enter projected number of individuals/households/service units for the output

[Save My Work and Mark as Completed](#)

[Save My Work](#)

[Save My Work and Close This Window](#)

[Close This Window](#)

Step 4 – click "Save My Work and Mark as Completed"

Performance Measures Section - Adding Outcomes

Outcomes > Add New

Outcome - i.e. benefits for participants during or after program activities:*

Step 1 – enter outcome text

Limit up to 2000 characters (0 used).

 [Save My Work and Continue](#)

← Step 2 – click "Save My Work and Continue" and you will be directed to the next screen

 [Close This Window](#)

Outcomes > Indicators > Add New

Outcome - i.e. benefits for participants during or after program activities: Households maintain housing for a minimum of 180 days after shelter exit.

Indicator:

Step 3 – enter the indicators (data) that will be used to measure the outcome

Limit up to 500 characters (0 used).

 [Save My Work and Add Another Indicator](#)

 [Save My Work and Continue](#)

 [Cancel and Return to Previous Page](#)

← Step 4 – click "Save My Work" and Add Another Indicator OR Continue as appropriate

Performance Measures Section - Adding Outcomes

Indicators

Number of individuals

Delete

Limit up to 500 characters (21 used).

	Projected	Mid-Year	End of Year
Number of Clients Served*	18		
Number of Clients Acheiving Goal*	15		
Percentage of Clients Achieving Goal	83.33		

+ Create a New Indicator

Step 5 – add number of clients projected to be served and number expected to achieve the goal stated in the outcome

Note – percentage of clients achieving goal will auto-calculate

Save My Work and Mark as Completed

Step 6 – click "Save My Work and Mark as Completed"

Save My Work

Save My Work and Close This Window

Close This Window

Performance Measures Section - Adding Outcomes

Indicators

Number of families

Limit up to 500 characters (18 used).

Project

Mid-Year

End of Year

Number of Clients Served*

Number of Clients Acheiving Goal*

Percentage of Clients Achieving Goal

2

0

Number of individuals

Limit up to 500 characters (21 used).

Project

Mid-Year

End of Year

Number of Clients Served*

Number of Clients Acheiving Goal*

Percentage of Clients Achieving Goal

0

✓ Updates saved successfully!

Delete

Delete

Note: for some outcomes, it makes sense to have more than 1 indicator. You can add up to 10 indicators per outcome statement

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Performance Measures Section - Adding Outcomes

Inputs

Create a New Input - i.e. resources dedicated to or consumed by the program

Staff	Edit	Delete
Case management software	Edit	Delete
Day center space	Edit	Delete

Activities

Create a New Activity - i.e. what the program does with the inputs to fulfill its mission

Assess and enroll people experiencing homelessness into Coordinated Entry System upon intake into the program	Edit	Delete
Provide people experiencing homelessness with case management services	Edit	Delete

Outputs

Create a New Output - i.e. the direct products of the program activities

Individuals will complete Coordinated Entry assessments to increase access to safe and affordable housing and shelter.	Edit	Delete	
Number	Projected	Mid-Year	End of Year
30			
Clients are referred to appropriate social services.	Edit	Delete	
Number	Projected	Mid-Year	End of Year
30			


Outcomes

Create a New Outcome - i.e. benefits for participants during or after program activities

Homeless individuals or those at risk of becoming homeless receive case management/skill-building services.	Edit	Delete	
Indicators	Projected	Mid-Year	End of Year
Number of Individuals	30		
Number of Clients Achieving Goal	30		
Percentage of Clients Achieving Goal	100		
Clients will increase their non-cash benefits.	Edit	Delete	
Indicators	Projected	Mid-Year	End of Year
Number of Individuals	30		
Number of Clients Achieving Goal	20		
Percentage of Clients Achieving Goal	66.67		
Clients will increase their income.	Edit	Delete	
Indicators	Projected	Mid-Year	End of Year
Number of Individuals	30		
Number of Clients Achieving Goal	10		
Percentage of Clients Achieving Goal	33.33		
Clients will obtain housing upon leaving shelter.	Edit	Delete	
Indicators	Projected	Mid-Year	End of Year
Number of Individuals	30		
Number of Clients Achieving Goal	10		
Percentage of Clients Achieving Goal	33.33		

Once completed, you can review all entries on the home screen

Performance Measures Section - Adding Outcomes


 **Community Impact**

FY 2024-2025 - Application

* Monroe County Test - New Test Program


Form Status: ● In Progress

Performance Measures FY 2024-2025



 **Please complete the following tasks.**
The following items have missing requirements:

- 'Staff'
- 'Case management software'
- 'Day center space'



Inputs

 [Create a New Input - i.e. resources dedicated to or consumed by the program](#)


Staff

 [Edit](#)  [Delete](#)

Case management software

 [Edit](#)  [Delete](#)

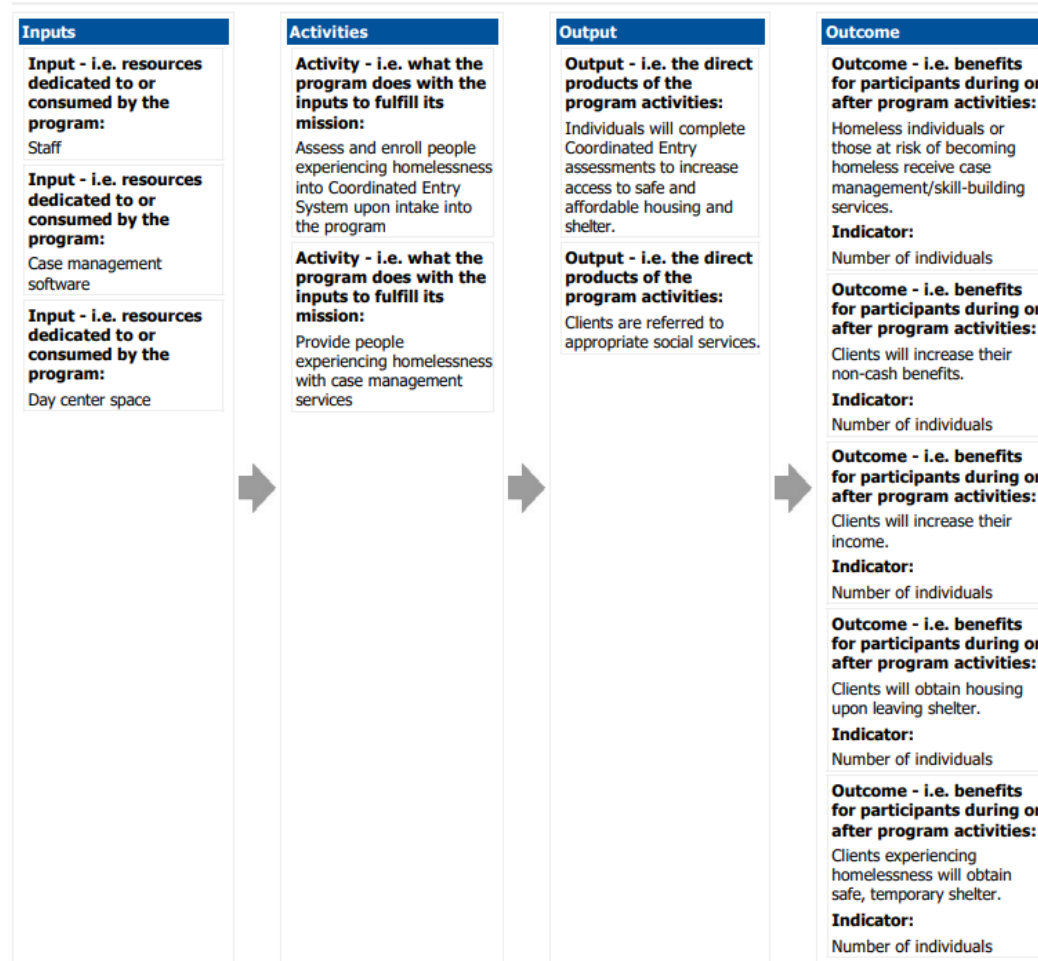
[Switch Forms](#)

[View Diagram](#) 

Click "View Diagram"

Performance Measures Section - Reviewing the Logic Model

* Monroe County Test / New Test Program
Performance Measures FY 2024-2025



Review all entries in the logic model

Performance Measures Section – Completing the Section

Indicators

		Projected	Mid-Year	End of Year
Number of individuals	Number of Clients Served	30		
	Number of Clients Acheiving Goal	10		
	Percentage of Clients Achieving Goal	33.33		

Clients experiencing homelessness will obtain safe, temporary shelter.

[Edit](#)
[Delete](#)

Indicators

		Projected	Mid-Year	End of Year
Number of individuals	Number of Clients Served	30		
	Number of Clients Acheiving Goal	28		
	Percentage of Clients Achieving Goal	93.33		

[View Diagram](#)
[Return to Overview Page](#)

[View Printable Version](#)

Close the logic model view, then click "Return to Overview Page" at the bottom of the screen

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Congratulations!
Your Performance
Measures Section is
now complete!

Other Reminders

- Site Visits
 - This is your opportunity to "show off" your program
 - Consider what aspects of the agency/program will tell your story
 - Staff or volunteer meet and greet
 - Seeing facilities
 - Stories/client interaction (if appropriate and ALWAYS with consent)

Centering Equity in Resource Investment

- Mandates from:
 - Our Strategic Plan
 - United Way Worldwide
- Going "beyond the check box"
- Capacity-building resources
 - Training
 - Consulting
 - Board Training

Centering Equity in Resource Investment

- Our next steps in advancing equity
 - Importance of data
 - Demographics
 - Board
 - Staff
 - Clients
- Stay tuned for more opportunities being announced in 2024!

Technical Assistance

- PMUW staff are available for technical assistance when needed if you are having trouble with the website, questions about the application. Please do not wait until last minute to reach out for assistance.

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Questions and Answers



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Contacts

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570-517-5362