Welcome to the Webinar.

We are excited to be bring back a webinar

I’m going to try to stick as close as possible to our scheduled hour, so we’re going to jump in.
A brief overview of our agenda:

- Funding Priorities
- Application Review
- Evaluation Criteria
- Timeline and Key Dates
- Q & A
Webinar Housekeeping

Powerpoint slides and webinar recording will be sent out after the webinar.

This webinar is intended to be an overview of the application and evaluation process.

We will not be covering how to use Foundant. If you want specific instructions, contact Hilary Pollan.

In general, this webinar is intended to be an overview of the application process. While we be going through details on the application and the evaluation, we are not going to spend much time learning how to use Foundant. If you want foundant we can share specific resources with you.

This year Chatham County is the full administrator for our funding process. That means if you have an issue with foundant on the Chatham County application, please contact me (not United Way).
For Questions During the Webinar, Please:

Type question into the Chat Box throughout the webinar.

Wait for questions to be answered during Q&A at the end of each section.

Ask questions that will be relevant to all applicants.

Reserve questions that are specific to your organization for office hours.
In FY22, we will fund programs or services that support BOC Outcomes.

This year we will be funding programs or services that support BOC outcomes. As I will describe later, we want your application to thoroughly discuss how your program or service is helping the county achieve the BOC outcomes.

What are the BOC outcomes?
FY22 Board of Commissioner Goal

“To mitigate the impacts of poverty among individuals and households in the county through programs and services that promote stabilization and resiliency.”
**Stabilization**

Process of **reducing of risk factors** that can result in crisis or emergency

**Resiliency**

Process of **adapting well in the face of adversity, trauma, tragedy, threats or significant sources of stress** — such as family and relationship problems, serious health problems or workplace and financial stressors *(American Psychological Association)*
FY22 Outcomes

- Improved economic stability for low/moderate income adults
- Improved outcomes for children/youth living in poverty
- Improved access to comprehensive health care
Economic Stability

Includes programs/services that address:

• Poverty Mitigation
• Employment
• Housing Stability
• Food Security
• Language and Literacy

Sources: Healthy People 2020, Economic Stability
Children and Youth

Includes programs/services that address:

- High School Graduation
- Enrollment in Higher Education
- Language and Literacy
- Early Child Education and Development

Sources: Healthy People 2020, Education; NC Early Childhood Action Plan, Learning and Ready to Succeed
Access to Healthcare

Includes programs/services that address:

• Access to Health Care (Physical and Mental)
• Access to Primary Care
• Health Literacy

Sources: Healthy People 2020, Health and Health Care; NC Early Childhood Action Plan, Healthy
In FY22, we will fund programs or services that support BOC Outcomes.

I want to talk a little bit more now about what we mean by program outcomes and outputs generally, and how we are describing their connection to the BOC outcomes.
**Outcomes**
A measurement of the specific results/change/effect the program or service is intended to achieve in the short, intermediate, and long-term.

*Outcomes* are a measurement of the specific results/change/effect the program or service is intended to achieve in the short, intermediate, and long-term.

Example Short-Term Outcomes:
- % decrease in school absences
- % increase in reading scores for program participants
- % increase in patient medication compliance

We want to know how your short-term outcomes – i.e., specific results or changes achieved by the program contribute to achieving the long-term BOC outcomes.
**Outputs**

A measurement of the immediate and direct result of a program or service such as the amount of service delivered, the reach of services, or how much was accomplished.

Example Outputs:
- # of hours of leadership programs delivered to low-income youth
- # patients who received free or reduced-rate treatment
- # of meals delivered to elementary school students
- # of home improvements to low-income households

Your program/service outputs should collectively contribute to the short-term outcomes you identify.
Now we’re going to move on to discussing the application.

As I mentioned earlier, the focus of this section is going to be on the application questions and less on how to use the Foundant platform. If you have questions about Foundant, please reach out to myself or Katie from UW and we will share helpful resources.
To begin, you can access the application in one of two ways.

1) Logon to the Chatham County website. Under the Residents tab, then “Nonprofit Partners and Grantees”. Click on the tab (which now says FY2022), and it will take you directly to the log on page for Foundant.
2) You can go directly to the log on page using the web address here.

And as a reminder, these links are embedded into the PPT and I will be sending the PPT out at the end of this meeting.
Eligibility and Application Instructions

Agencies applying for human services funds may not apply for funding for the same program from different county sources and vice versa.

Nonprofit agencies that are funded as part of the county operating budget may not apply for human services funds.

All applicants must complete a certification process to be assess the agency's eligibility to receive County funds.

Agencies submitting applications for more than one program or service must complete an application for each request, regardless of if they are for the same Board of Commissioner outcome.

1) Agencies applying for human services funds may not apply for funding for the same program from different county sources and vice versa.

Example: Cannot apply for Parks and Rec, JCPC and/or Emergency Housing Funds for the same program you are applying for in this process.

2) Nonprofit agencies that are funded as part of the county operating budget are not eligible to apply for funds.

3) All applicants must complete a certification process to be assess the agency's eligibility to receive County funds.

Change in policy:
Any agency requesting funds from the County must complete a certification process to be assess the agencies eligibility to receive County fund.

Agencies must complete the certification process only once per a fiscal year. The county operates on a July 1-June 30 fiscal calendar.
And now the application. The best news of the day – there are VERY few change to this year’s application. Our review of the application will primarily focus on what is new and/or different in this year’s application compared to last year’s application.

The application – there are 4 parts:
• General Information
• Agency Information
• Program/Service Information
• Certification Attachments

We will be going through each section – with a focus on what has changed since last year’s application.
Throughout this section I am using a few symbols to highlight our emphasis on supporting equitable and data-driven program/service delivery.

And the Equity symbol indicates questions that aim to understand/promote your agency’s use of an equity lens. Some of the equity-focused questions were pilot questions last year, but this year will be evaluated as a regular question.

The ruler (i.e. not a comb or a saw) will indicate when we are hoping to see the use of data or evidence-informed approaches.

There are no pilot questions in this year’s application.
Glossary of Terms

**Stabilization:** Process of reducing of risk factors that can result in crisis or emergency

**Resiliency:** Process of adapting well in the face of adversity, trauma, tragedy, threats or significant sources of stress — such as family and relationship problems, serious health problems or workplace and financial stressors

**Evidence-Informed Program or Service:** A program or service model that incorporates the best available research evidence

**Non-Binary/GenderQueer:** Terms used to describe genders that don’t fall into one of the categories of male or female

**Outputs:** A measurement of the immediate and direct result of a program or service such as the amount of service delivered, the reach of services, or how much was accomplished.

**Outcomes:** A measurement of the specific results/change/effect the program or service is intended to achieve in the short, intermediate, and long-term.

The start of the application also has a glossary of terms – which will also have “Stabilization” and Resilience” I’ll be going over each of these terms throughout the explanation of the application.
First Section is general information
It’s pretty straightforward contact information – and the same as last year.

This is also where you’ll record your total funds requested for Fiscal Year 2022.
Moving on to the next section – Agency information. This section is all about your agency. Most of these questions are exactly the same as last year, but again I will focus on what is new or has changed.
Agency Mission

Organization’s Mission, Vision, and Values
Character Limit: 1500

Pending Lawsuits

Are there reports of pending lawsuits, known fraud or embezzlement activity within the agency? If yes, please explain:
Character Limit: 1500

Agency Mission – includes vision and values

Character Limits are indicated under the question. The Character Limit includes spaces. 1500 character is approximately half a page.

Pending Lawsuits – a yes or no, and explain if yes.
Agency Evaluation

Does your agency receive a regular evaluation, certification or similar process by an external group for any programs you operate? If so, by whom? How often? Please report any deficiencies or corrective actions taken within the last five years.

Character Limit: 1500

Board Review of Financials

Does the Board Review your agency’s financials at least quarterly? If no, please explain.

Character Limit: 1500

Agency Evaluation – same question as last year. I want to add that the we recognize that smaller agencies may not have access to receive regular evaluations, and the evaluators will keep that in mind and evaluate accordingly.

Board Review of Financials – simple yes/no with an opportunity to explain a no response.
Schedule of Positions

# FTE Full-Time (e.g. 30 + hours per week) Paid Positions: ___
# FTE Part-Time (e.g. Less than 30 hours per week) Paid Positions: ____

Total Volunteer Hours

How many total hours do volunteers provide for your agency in Chatham County annually, including unpaid students and interns.

Schedule of Position – we again indicate what we mean by Full-Time and Part-Time

Volunteer hours – Like last year, we only want to know total hours (i.e. we’re not concerned about # of volunteers). We include unpaid students and unpaid interns in this count.
Program/Service Information

Now the big and exciting questions! The service information/narrative
Name of Program or Service

What is the name of the program/service that you are proposing to deliver?
Character Limit: 250

First question is to just put the name of your program or service
Outcome

The Chatham Board of Commissioners has a goal to “mitigate the impacts of poverty among individuals and households in the county through programs and services that promote stabilization and resiliency”. Which of the following outcomes will you primarily address with this funding?

- Improved economic stability for low/moderate income adults
- Improved outcomes for children and youth living in poverty
- Improved access to comprehensive health care

Outcome – You will select one Board of Commissioner outcome.

This is similar to last year. As I said earlier, the focus of the application should be how your program/service contributes to achieving the BOC outcome you select.

You can determine which outcome your proposed program/service fits under. We have offered some suggestions, which I shared earlier and can be found on the County website and on the application summary page on Foundant.
Program/Service Impact

Please briefly describe the impact of your proposed program/service. Include an explanation of:

• How it aligns with the Chatham County BOC Goal and Outcomes (see question above)
• What are the anticipated long-term impact(s) of your program or service on the proposed on the population served
• What evidence, quantitative and qualitative, demonstrates the impact of your program/service on the selected outcome
• How the program/service uses evidence-informed and/or research-based approaches to address need

This question is the same as last year’s question, but has a new name to better describe what the question actually aims to understand.

There has been re-wording of the second prompt about long-term impacts, which was a pilot question last year with performance measures.

The final prompt is a new addition to this question. Last year this prompt was part of the Program/Service Delivery question, but it fits better here as this question aims to understand how your program/service is data-driven.

Specifically, we interested in how your program/service uses evidence-informed and/or researched-based approaches in its delivery.

Evidence-informed approach refers to a program or service model that incorporates the best available research evidence

We've kept a larger character limit for this question, at 3000 – which is approximately one page single spaced – to provide you with ample space to describe your program/service.

Note the “Measurement” icon – we are looking for a strong use of data to justify why this
program/service is need and how your program/service has demonstrated impacting the selected outcome
**Program/Service Delivery**

Describe the proposed program/service delivery process. Include an explanation of the:

- Screening, Referral, and/or Admission Process
- Key Activities
- Frequency and Duration of Client Services
- Program/Service Schedule

Character Limit: 3000

This question is also the same as last year, minus the one prompt that we moved to the Program/Service impact question.

The focus of this question is to describe in greater detail your proposed program/service delivery. Note that the character limit here has also been set to 3000 – again allowing space for a full explanation.
Population Served

Please complete and upload the provided table with numbers of individuals previously served by this entire program/service.

- See THIS LINK for a map Chatham County Geographic Quadrants by Zip Code.

If you are not currently collecting data, please explain your reason for not collecting this data and/or plans to collect this data moving forward. If you are estimating data, please indicate which data is estimated and how you are estimating it.

Character Limit: 1500

Do you anticipate any changes in the FY22 population served? What populations are you not serving and/or struggling to reach, and how will you try to reach them?

Character Limit: 1500

This question is also the same as last year. From this question, we want to understand who our funded programs serve in Chatham County.

To respond to this question, open the excel form.
Fill in the top questions first.

Please include your End of Fiscal Year. You can use your own fiscal year, we just want to know what your Actual Previous Year #s refers to.
You will be filling in the Actual Previous year actual, again using your agency’s fiscal year.
Upon entering the Actual Previous Year numbers, the column to the right will auto populate to determine the % served.
We have filled in the Chatham County demographics for the same demographic categories, and we hope you’ll then take a moment to compare your program/services %s to those of Chatham County demographics. The evaluators do want to see under-represented and under-served populations receiving the services/programs they need.
Population Served

I want to talk through a few of the demographic categories

Non-Binary/GenderQueer: Term used to describe genders that don’t fall into one of the categories of male or female.
Like last year, we have divided the county into geographic quadrants – Northeast, Southeast, Northwest, Southwest – by zip code. County GIS staff have made (and updated) a nice little map for you that is hyperlinked in to the cell. So just click on the cell.
And you will open this beautiful little map, which has been updated with 2019 population data. We recognize that the zip codes don’t exactly map on to how we understand the quadrants, but zip codes are about as close as we can with geographic boundaries that should be easier to filter by.
Also, we’re allowing you to define “Low Income”. We realize that different agencies are required to report Low Income in different ways. We are fine with any definition, as long as you include it in your form 😊

For the county demographics, we are defining “Low Income” as individuals living below the federal poverty line.
Please complete and upload the provided table with numbers of individuals previously served by this entire program/service.

- See THIS LINK for a map Chatham County Geographic Quadrants by Zip Code

If you are not currently collecting data, please explain your reason for not collecting this data and/or plans to collect this data moving forward. If you are estimating data, please indicate which data is estimated and how you are estimating it.

Character Limit: 1500

Do you anticipate any changes in the FY22 population served? What populations are you not serving and/or struggling to reach, and how will you try to reach them?

Character Limit: 1500

In addition to the Population Served form, we have a few short questions we’d like you to answer.

First, we want to know if there is any data you are not currently collecting. And we’re asking this question because we recognize that some agencies are unable to collect certain information for different reasons. But if you are able to collect data and just currently are not, we want to know what you plan is to collect this information moving forward.

*NEW* this year is also an opportunity to describe any data that you’re estimating, again because we recognize that some data cannot be collected for different reasons and that estimations are the best you are able to provide.

And our final question is about any changes you expect to see in FY22 populations served, and if there any populations you’re not able to serve or struggling to reach.
Client Engagement

How are the people you serve involved in planning and decision making in your program/service? Do you consult program participants before, during and/or after implementation of projects or programs? How?

Character Limit: 1500

Last year this was a pilot question – but this year this question will be evaluated. This question aims to understand how those who receive/participate in programs/services are involved in decision making about the program/service planning and delivery.
Experience

What experience does your agency have in providing this program/service? Please include any achievements in carrying out similar projects in the past 3-5 years. If this program/service is new and innovative for your agency, what evaluation steps and/or plans do you have in place to ensure the new program/service’s success?

Character Limit: 1500

This question is mostly the same as last year. We want to know about your agency’s experience in delivering this program/service. This year we include a prompt to discuss any achievements you’ve had with carrying out similar projects.

Like last year, part of this question asks specifically about new or innovative programs/services. We support new and innovative programs, but we want to know how you intend to evaluate them during implementation.
Personnel

Please describe the qualifications of the staff and individuals delivering this program/service and the role each will play in the program/service. How do the staff and individuals delivering the program/service reflect the population or community that you serve, in terms of race, ethnicity, class, gender and/or lived experiences?

Character Limit: 1500

This question is the same as last year. We want to learn more about the staff and individuals delivering the program/services. In particular, we want to know how your program/service staff reflect the population or community you serve. And this is based on race, ethnicity, class, gender and/or lived experience.
Partnerships and Collaboration

What other organizations or county departments are directly involved with or will be directly involved in the delivery of this program/service. Please indicate a primary point of contact (i.e. contact name, position, email and/or phone number) for each organization and/or county department directly involved in program/service delivery that evaluators may use to verify this partnership and collaboration.

What other local organizations provide similar services or serve similar beneficiaries, and how do you work together?

This question has changed some this year.

We still want to know about the partnerships and collaborations DIRECTLY INVOLVED in delivering THIS specific program/service. However, we have simplified the way we’d like you to report this information in this year’s application which is simply to provide information for a primary point of contact at the partner agency/department that is DIRECTLY INVOLVED in delivering THIS program.

That includes providing a contact name, position, email and/or phone number.

We've kept the second question part of this question which is an opportunity to discuss your partnerships with agencies/departments that are NOT DIRECTLY INVOLVED, and/or how you coordinate with agencies providing similar services.
Consent to Validate Partnerships

Upon checking the box below, I consent to authorizing application evaluators to validate partnerships identified in the response to this question through individual contact by phone.

☐ Yes, I authorize evaluators to verify any partnerships I listed.

We again have a consent box to that will allow our evaluators to validate partnerships via a phone call.
Performance Measures

Using the provided template, indicate up to three short-term outcomes for the proposed program/service that support the selected BOC outcome, AND up to five outputs that support the previously indicated short-come outcomes.

View a SAMPLE performance measures template HERE.

This question is nearly the same as last year, but hopefully a bit simpler.

Like last year, I’ve created a template that you will download.

This year I’ve also provided a sample template that provides some examples. The sample template is hyperlinked to the question.
Performance Measures

In FY22, we will fund programs or services that support BOC Outcomes.

On the template, you’ll see the diagram we discussed earlier about how your program outcomes should collectively contribute to the BOC outcomes, and that your program outputs should collectively contribute to achieving your short-term outcomes.
Performance Measures

**Outcomes**

A measurement of the specific results/change/effect the program or service is intended to achieve in the short, intermediate, and long-term.

*Outcomes are* A measurement of the specific results/change/effect the program or service is intended to achieve in the short, intermediate, and long-term

Example Short-Term Outcomes:
- % decrease in school absences
- % increase in reading scores for program participants
- % increase in patient medication compliance
Outputs

A measurement of the immediate and direct result of a program or service such as the amount of service delivered, the reach of services, or how much was accomplished.

Outputs are A measurement of the immediate and direct result of a program or service such as the amount of service delivered, the reach of services, or how much was accomplished.

Example Outputs:
• # of hours of leadership programs delivered to low-income youth
• # patients who received free or reduced-rate treatment
• # of meals delivered to elementary school students
• # of home improvements to low-income households
Performance Measures

Unit of Service (e.g. individual, households, clients, etc.):

Primary BOC Outcome (Please Select):
- [ ] Improved economic stability for low/moderate income adults
- [ ] Improved outcomes for children and youth living in poverty
- [ ] Improved access to comprehensive health care

Back to the template.

The template begins by asking what your unit of service is.

Then you’ll select your primary BOC outcome which will be the same one you selected in the first question of the Program/Service Information Section.
Performance Measures

Indicate up to three short-term outcomes for the proposed program/service that support the selected BOC outcome (see below), AND up to five outputs that support the previously indicated short-term outcomes.

<table>
<thead>
<tr>
<th>Short-Term Outcome (%)</th>
<th>1</th>
<th>2</th>
<th>3</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Outputs (5)</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Then you will see two tables.

**FIRST** is the short-term outcomes. Please list UP TO THREE short-term outcomes that collectively contribute to achieving the BOC goal. You will just write the actual # of the percent. Example: 30% increase in reading comprehension among students in after-school tutoring program

**THEN** write UP TO FIVE outputs that collectively continue to achieve the short-term outcomes you mentioned above. Again, write the actual #. Example: 106 families will attend 2-hour virtual healthy living classes
**Proposed Program/Service Expenditures**

Please complete the provided expenditures template or submit your own expenditures file (as long as it contains the same information, in the same format, as requested in the provided template) for your proposed use of county funds for this program/service. Please explain “Other” in your file.

The proposed program/service budget is pretty straightforward
Include a list of expenses for how you propose to use COUNTY funds. This not a full program budget – it is specifically for this proposal.

Once you put your expense items in, the template will sum your total for you.
Proposed Program/Service Expenditures

Please use this optional space to provide any additional notes or clarifications to the proposal program/service budget.*

Character Limit: 1500

What is the overall cost of the proposed program/service?

The nonprofit allocation funds are intended to help leverage other sources of funding. What percent of the proposed program/service will the county funding cover? What is your plan for funding the balance of the program/service budget? What is your funding timeline and what are your other sources of support? If you are asking the county nonprofit allocation to cover the whole program/service’s cost, please justify your request.

In addition to the template, we’ve provided space for an optional budget narrative.

This year we are asking for the overall cost of the proposed program/service to offer some context to the request for our evaluators.

Then we’d like you to, we do want to know about how your request for county funds fits into your larger program budget, as we do not require a program budget.

And after that you will have completed the whole Program/Service Information Section!
The final section are your certification attachments
1. Audit

An audit is required by Chatham County for agencies with annual revenue of $500,000 and over. For agencies with annual revenue of less than $500,000, a financial review by an independent CPA is required. For agencies with annual revenue of less than $100,000, a financial analysis will be administered by Chatham County staff.

2. Management Letter (If Applicable)

We will be requiring an audit this year. The ranges for audit, a financial review by an independent CPA and a financial analysis by Chatham County staff is the same.

If your agency is eligible for a financial analysis by a Chatham County staff, please contact me immediately. The County will be conducting this process this year, not United Way.

If there are any issues with your audit, you will need to submit your management letter.
3. Agency Budget

Please complete the provided template OR submit your own board-approved agency budget file. All agency budgets must meet the following criteria:

- Include agency revenue and expense budget categories
- Include agency revenue and expense over prior year, current year and next year
- Provide an explanation for any variance between the last two years of more than 10%.
- Your budgeted is required to balance, which means that total revenues and expense should equal each other. Please include any use of cash reserve funds in your budget, and an explanation for their use/contribution.
- Please explain “Other” in your budget.

The agency budget. We are still requiring an agency budget, and are offering the same template last year, but again you can use a board-approved agency budget file as long as it includes the criteria we list.

Let's first look at the agency budget.
The budget template is the same as last year— and has the same criteria that need to be met if you’re submitting your own budget file. You will need to:

- Include agency revenue and expense budget categories
- Include agency revenue and expense over prior year, current year and next year
  - If you are not on a July fiscal year, please reach out to me and we can discuss different categories for you to use that better fit your agency
- Provide an explanation for any variance between the last two years of more than 10%.
- Your budgeted is required to balance, which means that total revenues and expense should equal each other. Please include any use of cash reserve funds in your budget,
3. Agency Budget

And then, please include:

- An explanation for your use/contribution to Cash Reserves.
- Please explain “Other” in your budget.
4. NC Solicitation License or Letter of Exemption

5. IRS Form 990

You’ll need to submit your:
- NC Solicitation License or Letter of Exemption AND
- IRS Form 990
6. Board Roster

Please include names, addresses, professional and/or community affiliations, year joined the board, and number of years on the current board. Include an explanation of board term policies, if needed.

We’ve simplified the board roster after a lot of confusion last year. This year we want to know:

- Name
- Address
- Professional and/or community affiliations
- Year the board member joined the board
- And number of years on the current board.

Please also feel free to share anything about your board term policies on this board roster if you think that will assist the evaluators.
7. Board Composition

Please describe how your board of directors and staff reflect the people and communities you serve. If the board currently do not reflect the people and communities you serve, please share the policies and procedures you have in place to promote equity, diversity and inclusion in your organization. We appreciate your honest reflections.

Character Limit: 1500

Last year this question was a pilot question, but this year it’s going to be evaluated. We want to understand how your board reflects the population you serve.
We’re continuing to use our Non-Discrimination/COI Disclosure form. The only change is that the non-discrimination clause includes sexual orientation and gender identity.

We provide a single form for both COI disclosure and non-discrimination clause.

So first you’re going to check off the questions. If you respond yes, to any of them, we will need you to explain. Our county attorney will review these explanations, and we will follow up with you if we have concerns that will affect your agency’s certification.

Please review the county’s non-discrimination clause

Then your Executive Director AND Board Chair will need to sign the form. Don’t forget about the board Chair needing to sign! This form is at the end of the application, so we’ve included another reminder to get your board chair signature in the very beginning of the application.
9. IRS 501(c)(3) Letter of Tax Exemption

* Only for first time applications or agency’s whose status has changed since December 31, 2020

10. By Laws

*Only for first time applicants or agency’s that changed their bylaws in the last year

One change here – you only need to upload your IRS 501c3 Letter of Exemption if you are a first time applicant OR your agency’s status has changed since December 31, 2020

And if you’re a first time applicant OR if your agency has changed their bylaws in the last year, you will need to upload your bylaws
We’ll move on now to the next section – Evaluation Criteria.
Application Evaluation Criteria

We will be sharing our evaluation criteria to increase transparency in this funding process.

Download on the Chatham County Website

Like last year, we are sharing our evaluation criteria in an effort to increase transparency in our funding process, and to help you all understand what are evaluators are specifically looking for in your responses.

You can download the evaluation matrix on the Chatham county website on the Nonprofit Agencies Process and Policy tab.
We are looking to fund programs that are: Effective, Efficient, and Equitable.

Let’s break that down into specific criteria area:

For effectiveness – we will be evaluating your:
- Program/Service Quality
- Performance Measurements, and
- Organization Background and Capacity

For efficiency, we will be evaluating your program/services:
- Resource efficiency
- Partnership and collaboration

And for equity we’ll be evaluating for your program/service’s:
- Demonstrated need
- Application of equitable principles
I’m going to focus now on helping you understand how to use the criteria matrix. I will not be going through the specific evaluative scale and criteria for each area, but hopefully this overview will help you navigate the rest of the matrix.

We’re going to focus on program service quality
So, you’ll download the matrix from the Chatham County website
### Application Evaluation Criteria

**Program/Service Quality**

<table>
<thead>
<tr>
<th>Values Criteria Areas</th>
<th>Associated Question(s)</th>
<th>Priority Block</th>
<th>1 Point</th>
<th>2 Points</th>
<th>3 Points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Effective</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program/Service Quality</td>
<td>Program Description</td>
<td>One</td>
<td>Vague or incomplete description of program/service and its delivery; and/or</td>
<td>Provides comprehensive plan and complete description of program/service and its delivery; and/or, and/or</td>
<td>User is able to describe description of program/service and its delivery, and/or</td>
</tr>
<tr>
<td></td>
<td>Program Delivery Experience Personnel</td>
<td></td>
<td>Does not use or consider evidence-informed approaches; and/or</td>
<td>Considers but does not use evidence-informed approaches; and/or</td>
<td>Uses evidence-based or evidence-informed approaches; and/or</td>
</tr>
<tr>
<td></td>
<td>Performance Measurements</td>
<td>Two</td>
<td>Organization lacks experience in delivering similar program/service; program is untested or uninnovative; program/service, and/or Staff delivering program/service are not qualified and experienced.</td>
<td>Organization has some experience in delivering similar program/service; program has been tested and is innovative; program/service, and/or Some staff delivering program/service are qualified and experienced.</td>
<td>Organization has experience in delivering successful program/service; program is innovative and has been tested in diverse settings; and/or Program/service staff are qualified and experienced.</td>
</tr>
<tr>
<td></td>
<td>Mission Summary Agency Evaluation</td>
<td>Three</td>
<td>Outputs and outcomes are generally unclear, unmeasurable and irrelevant; and/or</td>
<td>Outputs and outcomes are generally clear, measurable and relevant; and/or</td>
<td>All outputs and outcomes are clear, accountable and relevant; and/or</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Provides an unclear explanation of how outputs and outcomes support BCC outcomes; and/or</td>
<td>Provides a clear explanation of how outputs and outcomes support BCC outcomes; and/or</td>
<td>Provides a clear and compelling explanation of how outputs and outcomes support BCC outcomes, and/or</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Provides an incomplete population served form.</td>
<td>Provides a complete population served form.</td>
<td>Provides a complete population served form that demonstrates that the program serves under-represented populations.</td>
</tr>
</tbody>
</table>

The first page will look like this.
# Application Evaluation Criteria

## Program/Service Quality

<table>
<thead>
<tr>
<th>Criteria Areas</th>
<th>Associated Question(s)</th>
<th>Priority Block</th>
<th>Evaluative Scale</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Service/Quality</td>
<td>Program Description</td>
<td>One</td>
<td>1 Point</td>
</tr>
<tr>
<td></td>
<td>Program Delivery</td>
<td></td>
<td>2 Points</td>
</tr>
<tr>
<td></td>
<td>Experience Personnel</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<tr>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

## Focusing on Program/Service Quality.
Application Evaluation Criteria

Program/Service Quality

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<th>2 Points</th>
<th>3 Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program/Service/Quality</td>
<td>Program Description</td>
<td>One</td>
<td>Vague or incomplete description of program/service and its delivery; and/or</td>
<td>Provides somewhat clear and complete description of program/service and its delivery; and/or</td>
<td>Clear and complete description of program/service and its delivery; and/or</td>
</tr>
<tr>
<td></td>
<td>Program Delivery</td>
<td></td>
<td>Does not use or consider evidence-informed approaches; and/or</td>
<td>Considers but does not use evidence-informed approaches; and/or</td>
<td>Uses evidence-based or evidence-informed approaches; and</td>
</tr>
<tr>
<td></td>
<td>Experience Personnel</td>
<td></td>
<td>Organization lacks experience in delivering similar programs/services; and/or does not have a plan for evaluation for new/innovative programs/services; and/or</td>
<td>Organization has some experience in delivering similar program/service and/or has some plan for evaluation for new/innovative programs/services; and/or</td>
<td>Organization experienced in delivering similar program/service and/or has strong plan for evaluation for new/innovative programs/services; and</td>
</tr>
<tr>
<td></td>
<td>Personnel</td>
<td></td>
<td>Staff delivering program/service are not qualified and experienced.</td>
<td>Some staff delivering program/service are qualified and experienced.</td>
<td>Program/service staff are qualified and experienced.</td>
</tr>
</tbody>
</table>

For each criteria area, we have listed the associated questions (the questions listed correspond to the headers used in the application). The evaluators will only be looking at these associated questions when evaluating this criteria area.
Application Evaluation Criteria

Program/Service Quality

<table>
<thead>
<tr>
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<th>Priority Block</th>
<th>Evaluative Scale</th>
</tr>
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<tbody>
<tr>
<td>Program/Service Quality</td>
<td>Program Description</td>
<td>One</td>
<td>1 Point: Vague or incomplete description of program/service and its delivery, and/or does not use or consider evidence-informed approaches; and/or organization lacks experience in delivering similar program/services and/or does not have a plan for evaluation for new/innovative program/services; and/or staff delivering program/service are not qualified and experienced.</td>
</tr>
<tr>
<td></td>
<td>Program Delivery</td>
<td></td>
<td>2 Points: Provides somewhat clear and complete description of program/service and its delivery, and/or considers but does not use evidence-informed approaches; and/or organization has some experience in delivering similar program/service and/or has some plan for evaluation for new/innovative program/services; and/or some staff delivering program/service are qualified and experienced.</td>
</tr>
<tr>
<td></td>
<td>Experience</td>
<td></td>
<td>3 Points: Clear and complete description of program/service and its delivery; and uses evidence-based or evidence-informed approaches; and organization experienced in delivering similar program/service and/or has strong plan for evaluation for new/innovative program/services; and Program/service staff are qualified and experienced.</td>
</tr>
<tr>
<td></td>
<td>Personnel</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To score you for each criteria area, they’ll be using the evaluative scale which allows them to give a score of 1 to 3 points. Each point corresponds to specific criteria of what is in (or not in) your response.
I want you to note that to earn 1 and 2 points you can have some but not all of the criteria, which we indicate with the and/or language.
But to receive the highest amount of points, you will need to meet ALL the criteria, which we indicate with AND
I’m now going to discuss the “Priority Block” concept.

<table>
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<td></td>
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</table>

The table above outlines the criteria for evaluating program/service quality, focusing on key aspects such as program description, delivery, experience, and personnel. Each criterion is scored on a scale from 1 to 3 points, with higher scores indicating a more thorough and complete description or evaluation.
At the ends of the matrix you’ll see this graphic, which explains how we’ve allocated points to different questions through priority blocks.

The Priority Blocks categories reflect the emphasis or weight that will be placed on different Criteria Areas during evaluation. Criteria areas within Priority Block 1 are considered to be the “core” of your proposal, and therefore are worth the highest amount of points. Each block moving outward should serve to support and reinforce the “core” and the inner priority blocks. While the blocks moving away from the core will have less point value, all blocks should be considered important and essential to a sound proposal.

For block 1 criteria areas of Demonstrated Community Need and Program/Service Quality – you can earn up to 15 points per criteria area, and 30 points total.
For block 2 criteria areas of Performance Measurements and Resource Efficiency you can earn up to 9 points per criteria area, for 18 points total.
And for block 3 criteria areas of Organizational Background and Capacity, Partnerships and Collaboration, AND Equity — you can earn up to 6 points per a question, and 18 points total.

Last year equity was a pilot criterion. We have decided to include as a full criterion this year, but in the priority block with the lowest points.
We hope to continue to move equity closer to the core as we all know how important it is for our programs to be equitable in their management and delivery.
Hold in there, we’re almost done. I’m going to quickly review our timeline and key dates now.
This year, Chatham County will be the full administrator for the funds – meaning that your payments will come through the County rather than United Way.
Additional dates to keep in mind if you are awarded funding:

- Mid-Year Reports are due to foundant on January 15, 2022
- The Mid-Year Report forum will occur in the end of January 2022. This forum is not required for funded agencies, but attendance is highly encouraged. The participants in this year’s Mid-Year Report Forum will likely tell you that it was a very positive experience
- And Year-End Reports are due on July 15th
Timeline and Key Dates

FY2022 Applications are Due on Foundant by Friday, March 5th at 5PM

As ONE more reminder – FY2021 applications are due ON FOUNDANT by Friday, March 6th at 5PM.
We’re going to skip questions in the Timeline and Key Dates section, and move straight into the final Q &A session
Questions/Comments?

**Type** question into the Chat Box.

**Ask** questions that will be relevant to all applicants.

**Reserve** questions that are specific to your organization for Office Hours.

Q&A. Set Timer for 10 minutes
Office Hour Sign Up

Have questions specific to your agency’s application?

Sign up for an Office Hours Appointment using this Google Form Link: 
[https://forms.gle/NANfwaCq1yWYVQVN7](https://forms.gle/NANfwaCq1yWYVQVN7)

We’re going to wrap up now. If you still have questions that you want answered, or as you work on the applications questions come up, please consider signing up for office hours.

The link will take you to a google form that will provide me with enough information to schedule an Office Hour. I can meet video chat or by phone

[https://forms.gle/NANfwaCq1yWYVQVN7](https://forms.gle/NANfwaCq1yWYVQVN7)

NOTE: Agencies who came to office hours all scored higher in evaluation.
Thank you for your participation!

Comments/Question? Contact Hilary Pollan, Community Partners Analyst (Hilary.pollan@chathamcountync.gov or 919-545-8408)

And with that, we’ve made it to the end of our webinar. I want to thank you all for attending the live webinar, and for those that listen to this recording later, thanks for listening. Please do not hesitate to reach out with any comments or questions.

And I’ll just that I’m really looking forward to working with you all throughout this application process. Best of luck to each of you!