

Mighty Change



Valley of the Sun United Way Agency Grant Application Handbook 2025-2026

Valley of the Sun United Way Five-Year Impact Agenda

Beginning in early 2020, Valley of the Sun United Way engaged in an extensive process to develop a new Five-Year Impact Agenda. A new Impact Agenda was a priority of the Valley of the Sun United Way Board of Directors and staff was charged to “Launch a deliberate outward-facing stakeholder/community engagement process to hear and understand: 1) Today’s most pressing regional issues facing Maricopa County residents; 2) Aspirations for change with new, bold time-bound goals (5 years); and 3) United Way’s best role in helping to achieve those aspirations.”

This process included specific community focused conversations to gain insight on the most pressing issues. We started with two public surveys (with one entirely in Spanish) that had over 1,000 responses. These surveys were collected in February and July of 2020 and helped us learn about the most pressing issues facing the Maricopa County community.

Following the surveys, we held 18 Town Halls in the winter of 2020 that included approximately 350 attendees. During the Town Halls we asked attendees to help prioritize the identified community issues (from the two public surveys). The top issue areas were:

- Education,
- Health,
- Housing and Homelessness,
- Workforce Development, and
- Racial Equity.

We asked the specific questions on immediate and long-term concerns with these priorities. Attendees also provided feedback on Valley of the Sun United Way’s role to best address these issues.

Following the Town Halls, in January of 2021, Valley of the Sun United Way held 24 community meetings, focus groups, and targeted interviews with experts in the field to help further narrow the identified community priorities and drill down into specific strategies that could guide our work for the next five years.

In the third year of our Mighty Change 2026 strategic plan, we have collaborated with the community to refine our focus and develop targeted impact strategies. The strategies outline the specific programs and populations we will prioritize over the next few years to achieve our goals and is what we will be funding over the next two years as our Mighty Change five-year strategic plan comes to an end.

The following Impact Agenda is a direct result of a yearlong, community engagement and input process. This Impact Agenda has been a new direction for Valley of the Sun United Way’s work that expands beyond our traditional grant-making role and includes new opportunities for Valley of the Sun United Way to drive community change. Through this process, we repeatedly heard that our organization must work with government, business, education, and nonprofit sectors to achieve the critical short-term and long-term strategies to achieve bold aspirational community-level goals to motivate and rally the Valley’s corporate and community leadership, donors, volunteers, and all stakeholders around. The goals in this new Impact Agenda are bold and they are important and redirect our work to address TODAY’S issues facing Maricopa County. Valley of the Sun United Way will work every day so ALL members of our community - regardless of race, gender, and privilege - are healthy, are prepared for school and for career, have safe housing, and have the ability to provide for themselves and their families. TOGETHER, we can achieve our most aspirational goals. TOGETHER, we are UNITED.

We work with community to best use our dollars, time and expertise in building solutions and vibrant futures. The Grant Application process is one aspect of United Way’s mobilizing power to build capacity and fund in community-based solutions through the impactful direction and measurement of resources. The grants program provides funding that is competitive, open to nonprofits and schools operating in Maricopa County. It allows United Way to partner with community, organizations and schools for overall impact that moves forward our strategic priorities. Grant funding is distributed on a quarterly basis.

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Grant Application Overview

- This grant cycle will operate on a 12-month cycle, July 2025 – June 2026
- Additional cycles may open throughout the year
- Each funding area will be aligned with the Five-Year Impact Agenda and areas of focus for funding to support (detailed below)
- Organizations and schools may apply to more than one grant per Impact Agenda area
- Once submitted, program staff at VSUW may respond with questions or clarifications prior to the final decision being made
- We currently do not provide funding for capital campaigns or endowments

OUR VISION

Valley of the Sun United Way envisions a community where every child, family and individual is healthy, has a safe place to live and has every opportunity to succeed... in school, life, and work.

EDUCATION

Aspiration: *Close opportunity gaps to ensure children read at grade level by 3rd grade and youth are prepared for educational success and employment.*

Goal #1: Increase 3rd grade reading proficiency by 25%

Strategy: Work with schools and nonprofit partners to build and strengthen literacy capacity in early learning environments.

To ensure alignment with the 3rd Grade Reading proficiency goal, programs should:

- Be an evidence-based practice.

- Utilize a delivery model that adheres to established best practices. This includes a clearly articulated dosage (frequency and duration) of program delivery, a commitment to continuous quality improvement, the use of robust measurement tools to track progress, and participation in professional development opportunities to ensure program efficiency and fidelity to the evidence base.

Target population:

- **Title I Schools** serving income low communities in Maricopa County
 - Schools that are 25% below the state average ELA score
- Program serving **children/families that qualify for Free and Reduced Lunch** or fall within the following categories:
 - Schools that have a FRL of 80% or higher
 - Special education
 - English language learners
 - Living in foster care or experiencing homelessness

Goal #2: Increase youth ages 16-24 engaged in education and employment opportunities by 38%

Strategy: Work with schools and nonprofit partners to support and enhance youth engagement in both educational and/or career settings.

To ensure alignment with youth engagement and employment opportunities, programs should:

- Include a comprehensive approach that directly addresses the needs of youth, parents, families, and caregivers to enhance engagement in both educational and/or career settings
- Demonstrate a clear focus on increasing youth, parent and family support with the goal of keeping the youth engaged in schools and or employment
- Focus on positive adult relationships, socioemotional support, safe out of school environments, as well as college and career exposure

Target population:

- **Title I Schools** serving income low communities in Maricopa County
 - Schools that have a 10-15% or higher dropout rate than the state average
- Program serving **children/families that qualify for Free and Reduced Lunch** or fall within the following categories:
 - Schools that have a FRL of 80% or higher
 - Special education
 - English language learners
 - Living in foster care or experiencing homelessness

HEALTH

Aspiration: *Remove barriers to ensure everyone in our community is healthy, with a focus on access to food and healthcare.*

Goal #1: Decrease food insecurity by 50%

Strategy: Strengthen and support the emergency food system to reduce hunger.

- To ensure demonstrable progress towards our strategic objectives, it's crucial to maintain focus on achieving short-term, measurable goals such as the number of individuals receiving emergency food, assisting with SNAP, and meals supplied
- This approach allows for course correction and adjustments as needed while we work towards long-term aspirations like improved education and nutrition outcomes

Target population:

- Home-bound older adults and households in the Northwest Valley facing food insecurity
- Food desert communities in West Phoenix and South Phoenix along the I-17 and S-60 corridors
- Blue zone "informed" ZIP codes 85003, 85004, 85007, 85040, 85041, 85042

Goal #2: Increase access to affordable health care by 100,000 individuals

Strategy: Reduce barriers to accessing healthcare through outreach and services that increase participation in healthcare programs

- Continue to address barriers to healthcare access, including transportation limitations, social determinants of health, trust concerns, and cost burdens
- This strategy will be further enhanced through the expansion of outreach services, ultimately leading to increased participation rates

Target population:

- High health disparity communities in West Valley, downtown Phoenix, South Phoenix and rural Maricopa County
- Individuals experiencing homelessness
- Adults 50+

HOUSING AND HOMELESSNESS

Aspiration: *Ensure all can have a safe home to call their own.*

Goal #1: Reduce homelessness by 50%

Strategy: Increase support to programs that target the root causes of homelessness and prioritize wraparound support services to achieve housing stability and prevent homelessness.

- To optimize program effectiveness, the Housing & Homelessness strategy will provide a more holistic focus on preventative measures that help households avoid becoming unhoused
- Bolster programs that prioritize social determinants and address access to aid

Target population:

- Seniors
- Youth
- Families
- Justice-involved individuals

WORKFORCE DEVELOPMENT

Aspiration: Ensure all have a living wage job

Goal #1: Increase achievement of higher paying employment by 20%

Goal #2: Increase preparation for a living wage job by 33%

Strategy: Connect business and education to increase exposure to work-based learning, apprenticeship, and job opportunities that will raise income and create sustainable careers.

- To streamline program offerings and enhance program effectiveness, Goal #1 and Goal #2 will be merged into a single, comprehensive Workforce Development (WFD) strategy
- Focus on a broader scope of upskilling and educational opportunities tailored to propel individuals towards secure, higher-paying employment

Target population:

- Black, Indigenous, People of Color
- Economically disadvantaged
- At-risk of, or, experiencing homelessness

Should you have any questions on the grant application, please contact ecimpact@vsuw.org.

FY 2025-2026 Grant Application Timeline

January 22, 2025 – Grant Applications Released on e-CImpact

- Staff Available to provide Technical Assistance

Grant Application Orientations*

- Tuesday, January 21 from 11-12:30PM; register at https://us02web.zoom.us/meeting/register/tZUvc-ugrTktG9CHvE_Ez9YHtvXlq0J2iLg4
- Wednesday, January 22 from 1-2:30PM; register at <https://us02web.zoom.us/meeting/register/tZMvdO-ppzqgEtMnXgvhdwo8YydQtqLZbAfH>
- Thursday, January 23 from 9:30 – 11AM; register at <https://us02web.zoom.us/meeting/register/tZloceytpzouG9XIUAw9vBwr55U7eDXJYm9g>

**Webinars will be recorded and placed on our VSUW website*

February 20, 2025 – Grant Application Due, by 5 p.m.

March/April 2025 – Volunteer and Staff Review of Grant Applications

May 2025 – Funding Recommendations Determined

May 2025 – Funding Recommendations Approved by Board

June 2025– Award and Decline Letters sent to Agencies

June 2025 – Grant Awards Begin, First Quarterly Payments Paid Out

FY 2025-2026 Reporting Timeline

- ❖ January 15, 2026 – Mid-Year Report Due
- ❖ July 15, 2026 – End of Year Report Due

FY 2025-2026 Payment Timeline

- ❖ July 29, 2025
- ❖ October 28, 2025
- ❖ January 27, 2026
- ❖ April 28, 2026

VSUW FY 2025-2026 Grant Guidelines Template

Agencies will begin the application process with a pre-screening at both the agency and program levels, to ensure agencies are eligible for funding and that programs align to VSUW strategic priorities.

Agency Level

Are you a nonprofit 501(c)3 or school? Y/N

- If yes, applicant moves forward
- If no, applicant does not move forward

Will VSUW funding be used to serve Maricopa County residents? Y/N

- If yes, applicant moves forward
- If no, applicant does not move forward

Agency EIN#

Agency Arizona Corporations Commission Entity ID

Help Text: If you do not know this number, please conduct a search at Arizona Corporations Commission (azcc.gov) using your Agency (Entity) Name. The Entity ID is the ID number associated with the Entity Type Domestic Nonprofit Corporation. Do not use the Entity ID for a Trade Name

Program Level

Please select the impact area to which your program aligns.

- Funding Streams: Education; Health; Housing and Homelessness; Workforce Development
- Select the strategy to which your program aligns.
 - **Education**
 - Early education and reading to build and strengthen literacy capacity in early learning environments.
 - Student and family support to increase academic success, learning and access to socio-emotional services through mentoring and parent education classes.
 - **Health**
 - Food Access to Strengthen and Support the Emergency Food System and Home-Delivered Meals that Reduces Hunger in Families and Seniors.
 - Comprehensive Healthcare Access (Physical, Mental, Behavioral) to Reduce Access Barriers (ex: Transportation, Social Determinants, Cost, Lack of Trust) through Culturally Appropriate Outreach and Services to Increase Participation in Comprehensive Healthcare Services.
 - **Housing & Homelessness**
 - Prevention to increase investments in services and programs that prioritize prevention and support services / programs that decrease housing insecurity through targeted investments of rent/utility assistance, housing navigators, and eviction prevention focused on serving populations that are racially overrepresented in the unhoused population.
 - **Workforce Development**
 - Increase Resources to Assist Individuals to Obtain Educational and Job Opportunities through Hands-on Work-Based Learning, Apprenticeship and Mentoring Experiences which will Increase their Income and Create Sustainable Careers

Can your agency report out on these outcome measures? Y/N

- List prescribed measures based on strategy chosen (see addendum)
- Agency must select at least one set of outcomes measures that best aligns to selected impact area

VSUW FY 2025-2026 Grant Application Template

Agency Overview

1. Agency Name: (Pre-populated and Hard Coded)

Help Text Instructions: This cell is pre-populated and hard-coded and should be displaying the name of the agency.

2. President/CEO/Executive Director; Name, Pronouns, Phone; Email: (Drop Down Box)

Help Text Instructions: List the agency's Chief Professional Officer, usually the Executive Director or CEO, along with their title. Please note that if this individual is new, they may require a new e-CImpact log-in. Please email eCImpact@vsuw.org for access to the system.

3. Primary Agency Contact; Name, Title, Pronouns, Phone; Email (Drop Down Box)

Help Text Instructions: List the agency's primary contact, along with their title, pronouns, phone and email. This will be the individual who will be receiving VSUW communications besides the CEO/ED. Please note that if this individual is new, they may require a new e-CImpact log-in. Please email eCImpact@vsuw.org for access to the system.

4. Contract Signer Name, Title, and Email (3 Separate Text Box)

Help Text Instructions: List the full name, title, and email of the individual at the agency who is authorized to sign contracts

5. Agency Primary Address: (Drop Down Box)

Help Text Instructions: Identify the main business office location or P.O. Box address for the receipt of official correspondence.

6. Agency Description: (Text Box-750 Characters)

Help Text Instructions: Briefly describe the agency in a short statement. This description may be used in VSUW brochures, summary reports and general information provided to the public. Be sure to include when your agency first received your 501c3 status. This cell allows for population - limited to 750 character spaces.

7. Agency Mission Statement: (Text Box-500 Characters)

Help Text Instructions: Share the Agency Mission Statement. This is limited to 500 characters.

Agency Diversity, Equity, Access, and Inclusion

At VSUW we recognize that making meaningful impact requires a steadfast commitment to Diversity, Equity, Access, and Inclusion (DEAI). We seek to build the capacity of VSUW and our community partner organizations by incorporating a DEAI lens throughout our work. The questions in this section seek to gauge the intentional DEAI work your organization is currently engaged in internally and externally.

VSUW recognizes that DEAI language or related language can vary from organization to organization. If your organization uses different DEAI language (such as racial equity, racial justice, social justice, liberation) please use the language that most appropriately aligns with your organizational journey

1. Does your organization have, and outwardly communicate and post on your website, a stated commitment to equity and/or an equity vision, and/or equity, diversity, inclusion, and access statement? Y/N

1b. If Yes, provide statement and direct url. (Text Box- 500 Characters)

Help Text Instructions: Share the Agency Diversity, Equity, Access and Inclusion Statement. Here are the definitions for DEAI according to United Way Worldwide: This is limited to 500 characters.

Diversity: Each individual is unique, and groups of individuals reflect multiple dimensions of difference including race, ethnicity, gender, class, sexual orientation, age, physical abilities, religious beliefs, political beliefs, and cognitive styles.

Equity: In the context of societal systems, equality, and equity refer to similar but slightly different concepts. Equality generally refers to equal opportunity and the same levels of support for all segments of society. Equity goes a step further and refers to offering varying levels of support depending upon the need to achieve greater fairness of outcomes.

Access: Accessibility is giving equitable access to everyone along the range of human ability and experience.

Inclusion: Authentically bringing traditionally excluded individuals and/or groups into processes, activities, and decision/policymaking in a way that shares power.

2. Is your agency led by Black, Indigenous, and People of Color (BIPOC) ED/CEO? (Check Box)

Help text instructions: Select the box if your CEO/ED is Black, Indigenous, or People of Color.

3. What is your organization's commitment to DEAI? Provide your organization's DEAI statements or definitions, metrics that track DEAI, and/or any steps your organization has taken to advance DEAI within the culture of your organization and in its programs

4. To what extent are targeted populations engaged in shaping and leading the work of your organization? (Text box – 1,000 characters)

5. Dose your organization recognize cultural relevancy. If so, how do you incorporate, or plan to integrate, it into your daily operations? (Text box – 1,000 characters)

Program Overview

1. Program Name: (Hard Coded)

Help Text Instructions: This cell is pre-populated and hard-coded and should be displaying the name the agency uses to identify the program(s) within this application.

2. Alignment: (Drop Down Box)

Help Text Instructions: Please refer to the addendum (page 15) in the application guide for more information on which strategies align to each Impact Area.

3. Strategy: (Drop Down Box)

Help Text Instructions: Please refer to the addendum (page 15) in the application guide for more information on which strategies align to each Impact Area.

4. Amount Requested: (Text Box)

Help Text Instructions: List the amount of funding being requested from VSUW for FY2023-2024. This amount should be the same amount being listed in the Program Budget section, Line 1a. VSUW Funding Request.

5. Primary Program Location: (Drop Down Box)

Help Text Instructions: List the primary address where the program is offered, including the city and zip code.

6. Primary Program Contact Name, Name, Title, Pronouns, Phone, Email: (Drop Down Box)

Help Text Instructions: List the name, title, pronouns, and contact information for the primary contact for this program. This will be the individual that VSUW will reach out to for programmatic questions. Please note that if this individual is new, they may require a new e-CImpact log-in. Please email eCImpact@vsuw.org for access to the system.

7. Brief Program Description: (Text Box-300 Characters)

Help Text Instructions: Briefly describe the program in a short statement. This description may be used in VSUW brochures, summary reports and general information provided to the public. This section allows for population – limited to 300-character spaces.

8. Tell us how your program contributes to VSUW's Mighty Change goal based on your strategy alignment. (Text Box-1,500 Characters)

Help Text: Please include evidence-based research and impact to support contribution to Mighty Change goal that your program is aligned to. This will help VSUW better understand how your program is collectively positively impacting the community goal. Mighty Change goals are as follows:

- Decrease food insecurity by 50%
- Increase access to affordable health care by 100,000 individuals
- Increase youth aged 16-24 engaged in education and employment opportunities by 38%
- Increase 3rd grade reading proficiency by 25%
- Increase achievement of higher paying employment by 20%
- Increase preparation for living wage jobs by 33%
- Reduce homelessness by 50%

Narratives

VSUW understands that organizations applying for a VSUW grant are at different stages in their organizational growth – different types and sizes, including agencies with and without experienced grant writing staff. Narratives are designed to allow you to tell the story of your program, why it matters, and how you will achieve it. Additional detail for each requested narrative is provided in the Help Text.

1. Program Narrative/Strategies

Help Text:

Provide a brief but substantive synopsis of the program, and its services and activities.

- Specific alignment to the selected impact area/strategy
- Desired outcome(s)
- How equity and inclusion are integrated into program goals, strategies, activities, and intended results
- How the program addresses the needs of the target population(s) served
- How the target population accesses services
- Any/all follow-up activities with the target population designed to help ensure success and/or connect them to additional resources

This section allows for population – limited to 3000-character spaces.

2. Target Population

Help Text:

Provide information about whom this program serves.

- Direct and indirect participants
- Demographics: provide disaggregate data, if tracked

- Unique characteristics including, but not limited to, specific gaps or disparities, and service to hard-to-reach/historically disadvantaged and/or disenfranchised populations
- Service area location/s (e.g., Maryvale, South Phoenix)

This section allows for population – limited to 3000-character spaces.

3. Theory of Change/Program Design

Help Text:

Provide detail on the program approach and strategies. Consider using casual statements, “If we ____, then ____ will result.” based on evidence-based practices and/or research.

For each statement, provide:

- Evidence-based (proven impact) sources and/or third-party statistics that support the rationale for program services. Prioritize using community-level sources and statistics (your service area, and/or Maricopa County).
- An explanation of how equity and inclusion are incorporated into the program strategies or plans to further consider equity and inclusion in programs
- Description of what will be different in community, in the organization, and in programs through DEAI, and particularly a more equitable approach

This section allows for population – limited to 3000 character spaces.

4. Program Inputs/Resources

Help Text:

Describe the resources required to successfully deliver the program and its services and activities to your target population including, but not limited to, employees, volunteers, office space, vehicle(s), equipment, tools, skills, and knowledge. Are program staff reflective of the community that you serve*? Your response should correspond with the target population and program narratives, as well as the program budget.– limited to 3000 character spaces.

5. Outcomes Measures

Help Text:

Collecting and monitoring data regularly from program participants can inform you of their goals, aspirations, and priorities, the outcomes that they experience and value, and if your program is achieving its goals and measures. Please describe the following:

- Processes and data reporting you have in place that examine program impact on the target population, and on those experiencing the greatest gaps/disparities
- How you use data (both aggregated and disaggregated) to support continuous improvement, ensure accountability, and demonstrate equitable change; this should include your continuous quality improvement plan
- How your agency collects and shares client success that is not captured in VSUW data

This section allows for population – limited to 3000 character spaces.

What support does your agency need to develop capacity and knowledge on tracking VSUW prescribed outcome measures?

6. Budget Narrative

Help Text: Provide additional information that will assist in understanding the program budget and/or the requested amount of funding. Provide specific information on how VSUW funding will be used. This narrative will tie directly into the program inputs and activities. Provide an explanation for any amounts listed on budget line items “In-kind”, “DEAI” and “other” for both income and expense budgets. Explain the nature of any amount entered as Expense Budget, e.g. Salaries (FTEs covered), Specific Assistance to Individuals, etc. This section allows for population – limited to 3000 character spaces.

6. Share if you have experienced any decrease in funding that has impacted your organization’s capacity to deliver programming.

Help Text: Provide specifics on any funds (ex. ARPA funding) that may be impacted by the current grant cycle along with their end date. This information will help us better understand any funding that may no longer be available to your program. This section allows for population – limited to 3000-character spaces.

7. If this is an existing program in your agency, what was the total program expense?

Help Text: Please include your program expenses for the most recent year (12-month period).

Outcome Measurements

Help Text: Agencies will fill in FY 2025-2026 Goals. These are measures based upon the strategy chosen by the agency.

Output Measurement Table	FY 2025-2026 Goals
Output 1	
Output 2	
Output 3	
Output Etc.	

Help Text: Agencies will fill in FY 2025-2026 Goals. These are measures based upon the strategy chosen by the agency. There may be some strategies that do not include indicator measures. Some strategies may not have indicators, like Housing/Homelessness and Health. The indicator table includes both participation and achievement data. The % Achieving cells will auto-calculate when agency “Saves” the page.

Indicator Measurement Table		FY 2025-2026 Goals
Indicator 1	Total # Participating	
	Total # Achieving	
	Total % Achieving	Auto Calculate
Indicator 2	Total # Participating	
	Total # Achieving	
	Total % Achieving	Auto Calculate
Indicator Etc.		

Program Budget

Agency Instructions:

It is required that all agencies complete the program budget section. Provide the proposed Program Budget Revenue and Expenses for FY 2025-2026 (NOT the agency annual organizational budget). List how VSUW funding will be expended.

In line items:

- 1b. VSUW Other Funding, including any funding from donor directed funds
- 2. any other United Ways, including any funding from donor directed funds
- 11. Other Income, include detail of income not listed.

Revenue

Revenue	Program Budget FY 2025-2026 Proposed	VSUW Portion of the FY 2025-2026 Budget
1a. VSUW Funding Request		Auto Calculate
<u>*1b. VSUW Other Funding</u>		
2. Other United Ways		
<u>*3. Gov. Funding</u>		
4. Contributions / Donations		
<u>*5. Special Events / Fundraising</u>		
6. Legacies / Bequests		
<u>*7. Foundation & Corporate Support</u>		
*8. Program Service Fees & Reimbursements		
9. Investment Income		
<u>*10. In-Kind Support</u>		
<u>*11. Other Income</u>		
Total	Auto-calculate Column revenue: lines 1a-11	Auto-calculate Column revenue: lines 1a-11

Expenses

Expense	Program Budget FY 2025-2026 Proposed	VSUW Portion of the FY 2025-2026 Budget
12. Salaries		
13. Employee Benefits and Taxes		
14. Employee Education and Training		
15. Professional Fees and Contracts		
*16. Specific Assistance for Individuals		
17. Communications (phone, fax, modem, postage)		
18. Supplies/Equipment Rental and Maintenance		

19. Occupancy (rent, utilities, building & grounds)		
20. Advertising/Printing & Publications		
21. Travel / Meetings / Conferences		
22. Membership Dues/Support to Affiliate Org.		
23. Evaluation		
24. Non-Payroll Insurance		
25. In-Kind Expense		
<u>*26. Other Expenses</u>		
Total	Auto-calculate column expenses: lines 12-26	Auto-calculate column expenses: lines 12-26
27. Surplus / Deficit	Auto-calculate column: revenue total minus expense total	Auto-calculate column: revenue total minus expense total
28. VSUW Percent of Program	Auto-calculate column: line 1a divided by revenue total	

Financial Measures

Financial Statement Questions

Is your organization audited annually by an independent audit firm? [Yes or No]

If Yes, was an unmodified opinion issued for your most recently audited financial statements?

If No, was substantial doubt raised about the organization's ability to continue as a going concern? [Yes or No]

If No, please share management's response to audit opinion. [Text box; 250 characters]

Days of Cash on Hand

Cash*

Short Term Investments*

Days of Cash on Hand: *Will auto-calculate when form is saved*

Does your Agency have 60 Days or more of cash on hand?* *Yes/No dropdown*

If NO: How does the agency cover monthly expenses without adequate cash on hand?* *Text box allowing up to 500 characters*

If NO: Please detail out any cost reimbursement or gift in kind expenses that may cause you to be less than 60 days?* *Text box-500 characters*

Help Text: From your Statement of Activities

Change in Current Year Net Assets

Change in Net Assets Current Year*

Has there been a decrease in Net Assets?* *Yes/No dropdown*

If YES: Please explain the decrease in Net Assets.* *Text box-500 characters*

Help Text: From your Statement of Activities

Change in Prior Year Net Assets

Change in Net Assets Prior Year*

Has there been less than two consecutive years of losses?* *Yes/No dropdown*

If YES: Please explain the consecutive decreases in Net Assets.* *Text box-500 characters*

What has been done to end the trend of Net Asset loss in future years? *Text box- 500 characters*

Help Text: From your Statement of Activities

Program Efficiency

Program Expenses

Ratio: *Will auto-calculate when form is saved*

Is the Program Expense Ratio Over 85%? *Yes/No dropdown*

If NO: Please explain why the agency has such large administrative expenditures as compared to programmatic expenditures. *Text box-500 characters*

If NO: How will the agency ensure this grant money is spent no more than at an administrative rate of up to 25%? *Text box-500 characters*

Help Text: From your statement of activities or statement of functional expense

Debt to Asset Ratio

Total Liabilities*

Total Assets*

Ratio: *Will auto-calculate when form is saved*

Is your Debt to Asset Ratio Less than 50%* Yes/No dropdown

If NO: Please explain why the agency is highly leveraged by debt. How will the agency mitigate this exposure risk?* *Text box-500 characters*

Help Text: From your statement of financial position

Financial Notes

Additional Notes: *Text box-500 characters*

Funding Year FY 2025-2026 COMPLIANCE DOCUMENTATION REQUIREMENTS

- ❑ **Annual Agency Financial Statements:** Audited Financial Statements for calendar year 2024 or fiscal year 2023-2024, or most recently completed fiscal year. Must be submitted for agencies with **annual revenue of \$500,000 or more**. **Audit must be signed by the auditing agent or the auditing firm.**

Agencies with **annual revenue less than \$500,000:** Submit a calendar or fiscal year annual review of financial statements for calendar year 2024 or the fiscal year 2023-2024 or most recently completed year. Annual Review must list the names and titles of those that completed the review.

- ❑ **Management Letter/Auditor Recommendations:** Form SAS 115 or a letter from your auditor stating that no management letter was issued for calendar 2024 or fiscal year 2023-2024 or most recently completed year.
- ❑ **Formal Management Response Letter** Only need to upload if a Management Letter was issued. This will be the response letter from your management/board back to the auditor.
- ❑ **IRS Form 990 including Schedule A, Schedule B (if required), and all supplemental statements:** For calendar year 2024 or fiscal year 2023-2024 or most recently filed year. *IRS Form 990 must be signed and dated by the preparer and the chief professional officer or the agency's board chair.*

Addendum

Funded agencies/programs will need to align to VSUW strategic priorities and will need to report out on prescribed outcome measures, based on the chosen strategy for the program.

Education

- Build and strengthen literacy capacity in learning environments

Data Requirement: Build & Strengthen Literacy Capacity
of unduplicated individuals served
of individuals indirectly impacted
of literacy resources provided
#/% of individuals completing professional development activities
of participants being tutoring and/or academic assistance
of tutors
of hours of tutoring delivered or academic hours provided
#/% of participants who implement/demonstrate an increase in knowledge and skills
of individuals showing growth based on assessment, report card grades or benchmark data

- Increase online learning and socio-emotional supportive services

Data Requirement: Learning & Socioemotional Support
of unduplicated individuals served
of individuals indirectly impacted
of socioemotional and online learning resources provided
of mentoring hours
of participants that were provided intentional 1:1 mentoring
of participants in life skills trainings/workshops
of participants served in a safe learning environment
#/% of participants completing professional development activities
#/% of participants who implement/demonstrate an increase in knowledge and skills
#/% of participants developing a positive adult relationship
#/% of participants demonstrating an increase in protective factors

Health

- Strengthen and support the emergency food system and home-delivered meals that reduces hunger in families and seniors

Data requirement: Food Access
of unduplicated individuals receiving emergency food
of meals supplied to individuals
of congregate meals
of home delivered meals
of other meals served (snack packs, supplemental or senior food boxes, etc.)
of individuals enrolled for SNAP benefits

- Reduce barriers to access (ex: transportation, social determinants, cost, lack of trust) through culturally appropriate outreach and services to increase participation in comprehensive healthcare services

Data requirement: Healthcare Access
of unduplicated individuals served
of individuals that participated in comprehensive medical/mental health services
of individuals that increased knowledge of how to overcome barriers to access
of transportation rides provided (medical/mental health services)
of individuals screened for medical/mental healthcare benefits
of individuals enrolled for medical/mental healthcare benefits
of individuals connected to a community resource for basic family needs

Housing and Homelessness

- Wraparound Services that Prevent and Assist those Experiencing Homelessness through Targeted Investments of Rent/Utility Assistance, Housing Navigators, and Eviction Prevention

Data requirement: Prevention and Assistance
of unduplicated individuals served
of individuals diverted
of diversion services secured for individuals seeking assistance
of unduplicated assessments for government benefits administered (excluding social security and medical/mental healthcare)
unduplicated clients working with a navigator/case manager
of individuals moved to safe and stable housing because of a navigator / case manager
of referrals for Permanent Housing
of individuals enrolled for medical/mental healthcare benefits
of utility assists
\$ amount mortgage/foreclosure prevention assistance
\$ amount rental assistance
of mortgage/foreclosure prevention assists
of individuals/families who increase income enough to no longer need emergency aid

of individuals who received legal aid regarding an eviction
of housing navigators
of rental assists
of units of transportation assistance

Workforce Development

- Increase resources to Assist Individuals to Obtain Job Opportunities which will increase their income and Create Sustainable Careers
- Support business and Education Alignment to Increase Education Opportunities for Students through Hands-on Work-Based Learning, Apprenticeship and Mentoring Experiences
- Increase skills and education opportunities

Data Requirement: Workforce Pathways through Education
of unduplicated individuals served
of individuals who access resources
of individuals receiving 1:1 mentorship
#/% of individuals who complete a job training/workshop program
#/% of individuals who complete certification/licensing requirements for employment
#/% of individuals that complete a 2-Year or 4-Year degree program
#/% of individuals that self-report an increase in skills/knowledge
#/% of individuals who complete apprenticeship
#/% of individuals who complete internships
#/% of individuals who obtain employment
#/% of individuals who maintain their employment status for at least 3 months
#/% of individuals/families with increased income

Evaluation

Guide to the Evaluation Criteria Form FY2025-2026 Process for Valley of the Sun United Way: Housing & Homelessness

Introduction:

This guide is intended to help reviewers successfully navigate the FY 2025-2026 grant application and complete the evaluation form.

Directions to Fill Out Evaluation:

The FY 2025-2026 Agency Applications will be evaluated and scored based on the following criteria:

Criteria	Points Possible
Agency Capacity	10
Program Design	40
Program Performance	40
Budget	10

To ensure consistent evaluation methodology, all programs start with all points available for each category; points are taken away for missing and/or unclear information, or if the given information indicates the criteria is not being met. After scoring each category, please include your comments on why the application evaluated was given that score.

Agency Capacity: 10 Points Available

The agency overview provides a general glimpse of the agency. The agency's mission and vision should strongly align to VSUW's Mighty Change 2026 five-year strategic plan. A significant component of Mighty Change 2026 is VSUW's deepened approach to Diversity, Equity, Access and Inclusion (DEAI), which includes examining how our partners are approaching their own DEAI work. Although they may be beginning their journey with DEAI, there should be a clear plan on how they plan to incorporate it in the near future.

VSUW continues reflecting on DEAI in the grant evaluation process, and we anticipate that there is work to align our approach with the grant application and review process. As we continue to strengthen our application of DEAI, we will be soliciting your feedback as a reviewer.

One key component of DEAI is aligned language, VSUW's definitions of DEAI are as follows:

- Diversity: Each individual is unique, and groups of individuals reflect multiple dimensions of difference including race, ethnicity, gender, class, sexual orientation, age, physical abilities, religious beliefs, political beliefs, and cognitive styles.
- Equity: In the context of societal systems, equality, and equity refer to similar but slightly different concepts. Equality generally refers to equal opportunity and the same levels of support for all segments of society. Equity goes a step further and refers to offering varying levels of support depending upon the need to achieve greater fairness of outcomes.
- Access: Accessibility is giving equitable access to everyone along the range of human ability and experience.
- Inclusion: Authentically bringing traditionally excluded individuals and/or groups into processes, activities, and decision/policy-making in a way that shares power.

VSUW also recognizes that partner organizations may be using DEI language that differs from VSUW. If the agency is utilizing DEI, racial equity, racial justice, liberation, abolition or another framework to address disparities and to center those most marginalized, **the points allocated for this section should not be adjusted for differing language.**

The agency provided information on its DEAI journey as it relates to its cultural relevance, including how their organization strive to have leadership, staffing, and practices that (1) represent the culture(s) of their clients, (2) honor clients' values, beliefs, attitudes, and traditions, (3) acknowledge differences and similarities in power and privilege among groups of people, and (4) use this knowledge to work effectively with all people. Measures can include age, race, ethnicity, country of origin, religion, sexual orientation, gender identity, socio-economic standing, level of education, physical and mental abilities, and/or lived expertise.

Agency Capacity Instructions:

The overview of the agency will be found in the application in the Agency Overview and Agency DEAI section.

Evaluator Comments: 1000 characters available (including spaces)

Explain how score was determined. Share why points were subtracted.

Program Design: 40 Points Available

The program narratives describe the program design and should strongly align to the selected Mighty Change impact area and strategy. The information in this section is clear, concise and focused on the overall program—not the agency. The program’s target population, inputs/resources, activities/strategies, outcomes, and budget narrative provide a comprehensive and clear overview of the program goal and activities, and paint a picture of a strong program design that would lead to client success. There is clear alignment of program design with the agency's DEAI goals.

There is a clear understanding of the target populations needs and barriers and how they will be better with this program. The agency was able to provide data, preferably disaggregated data, to describe and define the community/issues it serves. The agency is able to describe how targeted populations are engaged in shaping and leading program design.

Program Design Instructions:

The program narratives will be found in the application in the Narrative section.

Evaluator Comments: 1000 characters available (including spaces)

Explain how score was determined. Share why points were subtracted.

Program Performance: 40 Points Available

Performance goals strongly align to the program narratives and clearly detail measurements used to measure the successful achievement of the program. Performance goals have been created based on historical knowledge and data (disaggregated data, when available). Additional metrics of success have been added to further capture the success of the program.

Program Performance Instructions:

The outcome measurements will be found in the application in the Outcome Measurements section. The agency was able to describe its impact, its intended impact over the grant period, and how its efforts lead to more equitable outcomes for communities either through quantitative data or qualitative data (for example: narratives or storytelling).

Evaluator Comments: 1000 characters available (including spaces)

Explain how score was determined. Share why points were subtracted.

Program Budget Scoring Criteria: 10 Points Available

The budget demonstrates capacity to deliver the program. Resources are aligned to achieve program delivery and program outcomes. The program request is reasonable based on the size and scope. The budget narrative clearly explains how VSUW funding will be utilized. Allocation of DEAI costs are detailed and connect to the agency's DEAI efforts.

Program Budget Instructions:

The program budget information will be found in the application in the Program Budget and the Narrative section. The budget should align with the program framework submitted.

Evaluator Comments: 1000 characters

Explain how score was determined. Share why points were subtracted.

Program Evaluation Form:

Agency Name: _____

Program Name: _____

Reviewer Name: _____

Evaluation Criteria	Prompts	SCORE	Notes
<p><u>Agency Capacity (Agency Overview/DEAI):</u></p> <ul style="list-style-type: none"> The agency mission and description is aligned to VSUW's Mighty Change 2026 five-year strategic plan The DEAI section provides a clear plan for more cultural relevancy as it relates to Diversity, Equity, Access and Inclusion (or in agency's own DEI related language) 	<ul style="list-style-type: none"> ➤ Clear mission that aligns to Mighty Change 2026 five-year strategic plan ➤ Clear understanding of what the agency does as a whole ➤ Clear understanding of how the agency is planning to create a more diverse, equitable, accessible and inclusive environment within itself ➤ Clear information provided on agency's cultural relevancy ➤ Agency understands its gaps in representation of communities and has a plan to address those gaps 	<p>10 Points Total</p>	
<p><u>Program Design (Program Narratives):</u></p> <ul style="list-style-type: none"> The program narratives aligned to selected Mighty Change impact area and strategy The narratives provide a comprehensive and clear overview of the program goal and activities, and paint a picture of a strong program design that would lead to client success 	<ul style="list-style-type: none"> ➤ Clear understanding of population served; <i>a population or area in need- data and/or disaggregated data is provided.</i> ➤ Clear understanding of the resources needed and activities for a success program ➤ Clear understanding of why this program is important and/or any evidence-based studies tied to the program's effectiveness ➤ Clear programmatic results that tie to the resources and activities ➤ The agency was able to provide data, preferably disaggregated data, to describe and define the community/issues it serves ➤ The agency is able to describe how targeted populations are involved in program design. 	<p>40 Points Total</p>	
<p><u>Program Performance (Outcome Measurements)*:</u></p> <ul style="list-style-type: none"> The measurements strongly align to Program Narrative The program has well-articulated results achieved through funding <p><i>*Please note that programs are not required to report on all prescribed metrics</i></p>	<ul style="list-style-type: none"> ➤ Meaningful client-focused outcomes ➤ Explanation of participation ratios and assessment of number ➤ Additional metrics included to measure programmatic success ➤ Agency identifies equitable outcomes for communities either through quantitative data or qualitative data (for example: narratives or storytelling) 	<p>40 Points Total</p>	

<p>Program Budget:</p> <ul style="list-style-type: none"> • The budget demonstrates capacity to deliver the program. • Resources are aligned to achieve stated program results. • The program request is reasonable based on the size, scope and scale of the program. 	<ul style="list-style-type: none"> ➤ Braided funding ➤ Request is reasonable and expenses are fully and clearly explained ➤ It is clearly explained how VSUW funding will be utilized ➤ Details on use of DEAI funding 	<p>10 Points Total</p>	
		<p>Total Program Evaluation Score:</p>	<p>100</p>