FY25 RF Application – Manatee County Government – CSAB
Application Period December 6, 2023 – January 24, 2024

A – Organizational Strength

1. What is your **mission statement**?
Purpose of Question: While not scored, this is important to ensure that the program is fully within the mission. In some cases, nonprofits start work (especially if funds are offered) in areas outside of their core focus. i.e., last year Easter Seals stated they met the priority of adoption preservation when their mission is serving disabled children, some of which are adopted.
Scoring Area: This is not a scored question
Applicant Guidance: Simply provide us what you now have and use. Short and sweet is just fine!
Examples: • The mission of the Davis Health Alliance is to ensure that low income and at-risk individuals in our county get and use health care services. • The Carver After School Program is to change the odds now stacked against kids from low income families who are at high risk of school drop-out.

2. What does your **organization know how** to do especially well that most contributes to this program achieving great gains for its participants?
Purpose of Question: The extent to which an agency understands what it does well is a major strength for many reasons, including hiring to fill shortfalls in knowledge or skills. It is far more predictive of success than a word smithed mission or vision statement.
Scoring Area: 1) Organizational Strength – Core Know-How
Score Range: 0-2 **2 –** They have clearly stated one or more specific content on knowledge and /or skills that they have and that seem critical to the success in this program. It is specific, not general. **0 –** They did not state a specific core know-how or did so at a very vague level.
Applicant Guidance: Core know-how is often expressed in two areas: 1. Knowledge of organizational insights, including quality of services necessary to properly meet the needs of clients. This includes understanding the history or need; and 2. Skills that your organization has and knows how to apply well when meeting the needs of clients who are identified as needing the services provided.
Examples: • Previously, we thought our core know-how was in educating—telling pregnant women about the importance of getting prenatal care and following medical advice. We now know we are more in the business of persuading than informing. Our core know-how is our skill in defining the key messages that cause young women to form a conviction that they should get prenatal medical care (especially in first trimester of pregnancy) and then act on that belief. • Our core know-how is twofold: a) having an intervention pathway into schools through principals; and b) ways to use data to track what we do next with a child in our program.

3. What predicts **leadership sustainability** for the organization?
Purpose of Question: Any issues of organizational survival are important to understand in that they consume time and attention that is diverted from effective programs. This question focusses on leadership where a loss of a board chair or CEO can cause real challenges. Even if successful, programs may slow down during a transition period. Of special concern: the loss of a well-liked founder.
Scoring Area: 2) Organizational Strength – Leadership Sustainability
Score Range: 0-2

2 – There is nothing flagged or stated to question leadership sustainability. No key person is leaving for falling short. Or, if so, they have found an impressive new person.

0 – There is a clear and unresolved issue with leadership sustainability.

Applicant Guidance: Include recent or anticipated turnover of key leaders for the organization and for this program. Also note any changes in board members and especially the board chair, as these transitions can also bring some level of disruption.

Examples:

- Our leadership is solid. Kathryn, the CEO, anticipates remaining for at least the next five years as do all key staff. Board leadership rotates and we have identified the next two alternating chairs. We anticipate that they will be here to assume that role.
- Jose, our program leader, is planning on retiring next year. While his leaving is a loss, he had identified and is mentoring the person who will take his place. We do not foresee any loss of momentum, services, or accomplishments with this transition.

4. What predicts **financial stability** for the organization?

Purpose of Question: Money is the second key area for sustainability. When an organization runs low on cash, much attention can be diverted from programs to staying afloat, even if the organization looks good by the end of the year. And trends toward higher expenses than incomes do not bode well for stability.

To understand the dynamics of any organization, a look at 3-year trend lines is very important. Is the organization growing or shrinking? (i.e., not adding staff if they are not generating enough revenues.) It is important for an organization to ensure funding and avoid financial instability or crisis in the event of a loss of funds. This question exposes the organizations methods in predicting their financial stability, how they define financial success, and what measures they use to do such.

Scoring Area: **3) Organizational Strength – Financial Stability**

Score Range: **0-4**

4 – There is no discrepancy between the narrative on stability and the numbers provided in the trend lines. The trend line over the past 3 years shows and excess of revenue over expenses and they are not overly dependent on investment from the county without reason (see program revenue sources in program budget). The trend is either stable at positive performance or getting stronger each year. There are no flags indicating financial instability, the organization describes their current financial situation as well as their future predictions.

2 – There may be some discrepancy between the narrative on stability and the numbers provided in the trend lines. The trend line shows the organization is break even with revenue and expenses annually. They are not completely dependent on the county (see program revenue sources in proposed budget) The organization has shown financial stability in the past but is currently running in a deficit with no concrete plan on getting into a surplus.

0 – They are losing money or are totally dependent on county funds to carry on without reason. There is no prediction for financial stability, or the organization offers no insight on their financial reporting.

Applicant Guidance: Include financial trends, events (e.g., gain or loss of a key donor). Also comment on any challenges you have on available cash to cover salaries and other expenses. An annual excess of income over expenditures is not reassuring if you can't meet payroll in the middle of the year. If you have been operating at a deficit, provide an explanation of the plan to get out of that financial situation.

- Revenue: Enter total organizational income from all sources.
- Expense: Enter total organizational costs, including overhead (administrative costs).
- Number of staff throughout the organization.

3 Year Trend Line	**1 Year Ago**	**2 Years Ago**	**3 Years Ago**
Organizational Revenue	$	$	$
Organizational Expense	$	$	$
# Staff Organization-wide			

Examples:

- The Guilford Health Group confidently predicts its sustainability over the next 5-10 years. While our financial net varies year to year, we are always “in the black” over any 3-year rolling average. Further, our government and foundation payments give us positive cash flow. Our key funders show no evidence of losing either money or interest in supporting us.

- Learning Turnaround has been in existence since 1963 and has never been in a stronger financial position. We have built a $1.5 million endowment and have diversified our revenue to the point that 60% comes from grants and 40% is earned income from services for which we charge. Our audited financials (including management letters) show that we are in good standing for the last 3 years.

5. Provide the following information on the characteristics of your **Board of Directors**:

Purpose of Question: The ability of a board member to add the greatest possible value increases when they personally know and have experienced the problems and/or solutions that the organization addresses. This goes beyond knowing a field by reading about it.

Scoring Area: 4) Organizational Strength - Board

Score Range: 0-4

- **4 –** Five or more subject areas with significant experience, 90% of board members contribute dollars and strong and clear nepotism policy.
- **2** – Three to four subject areas with significant experience.
- **0** – Two or less subject areas with significant experience.

	# of board members
	# of board members who are residents of Manatee County
	# of board members who support with annual contributions

Provide the number of board members with significant experience in the following areas:

Applicant Guidance: Significant means that board members have practiced in the area—e.g., held a role in that field. Personal connection to agency's mission, means a person who has experienced the problem area addressed—e.g., a person with a disabled child (or relative) who invests their time on the board of an agency that helps disabled children. The nepotism policy should include whether board members may be related, board members related to staff, and staff related to staff that they supervise.

	Finance		Personal connection to agency's mission
	Nonprofit management		Field(s) in which your agency works
	Law		Direct experience with kinds of people served
	Business		

Provide the agency's **policy on nepotism** at all levels. Include whether board members may be related, board members may be related to staff, or staff may be related to staff that they supervise.

Required Documents

Applicant Guidance: It is recommended to have a folder saved on your computer desktop that includes all the documents and uploads needed for the application process. Please name each document as requested and include the program name at the end. To upload, click "choose file" then click the "upload" button to ensure your file is loaded properly. If the name of the document is listed on the application screen, then it has been uploaded and will be submitted with your application. ***NOTE:*** You must "save" this page to complete the upload process.

Tax Exempt Status Verification 501c3

Purpose of Request: A tax exempt status verification is requested because the Children's Services Ordinance only allows the funds to be used to pay tax exempt agencies (non-profits, state agencies, and political subdivisions of the State of Florida).

Applicant Guidance: The letter from Internal Revenue Service stating the tax-exempt status of the non-profit agency. Governmental agencies may meet this requirement by uploading the current Consumer's Certificate of Exemption from payment of Florida Sales and use tax issued by the Florida Department of Revenue.

IRS 990 Tax Return
Purpose of Request: The IRS 990 provides a snapshot of the agencies purpose, staffing, and sources of financial support, and use of funds. It may be used to answer questions such as: Does the revenue indicate too much reliance on a source that could be jeopardized by a weak economy, declining stock marker, or other external factor; Does the compensation listed for paid staff appear justifiable in view of the organization's activities and their responsibilities?
Applicant Guidance: The federal tax return public charities file with the Internal Revenue Service. IRS 990, or 990EZ, must be most recent year filed. **This is not required for a federal, state, or local governmental agency.**
Certificate of Liability Insurance Coverage
Purpose of Request: A certificate of liability insurance is requested because certain amounts of coverage are a requirement to receive an investment from the county. The certificate lists the coverages held by the insurer as well as lists Manatee County Government as additional insured on the policy.
Applicant Guidance: A Certificate of Insurance as evidence of the agency's current coverage. Required coverage: • Commercial General Liability in an amount not less than $1,000,000 per occurrence and in the aggregate; and • Professional Liability in an amount not less than $1,000,000 per occurrence (if required).
Certificate of Status
Purpose of Request: The Certificate of Status tells us that the corporation has not dissolved or failed to maintain active and provides the legal name of the corporation.
Applicant Guidance: Certificate of Status from Florida Department of State, Division of Corporations, **must be for the current calendar year and state "active status".** **This is not required for a federal, state, or local governmental agency.**
Agency Financial Audit
Purpose of Request: An audit is required by the county to receive any funds through a contract. The audit is a review of the organization's financial condition (lists all revenues and expenditures) and level of financial accountability including use of accepted accounting practices, internal controls, and separation of duties.
Applicant Guidance: • The agency's most recent audited financial statement or compilation from an independent certified public accountant registered in the State of Florida. • The audit/compilation **must be less than 2 years old** to receive funding from Manatee County.
Audit Management Letter
Purpose of Request: If an audit management letter was received by the agency, it will list concerns and recommendations. The organization should have adopted the recommendations it contained regarding improvements in the accounting system and controls.
Applicant Guidance: The management letter related to the agency's last audited financial statement or compilation by a certified public accountant registered in the State of Florida.
Board of Directors List
Purpose of Request: The board list provides information on the members, such as the county of residence, their profession, and the term dates for officers. It may be a concern if there are no Manatee residents on a board. County Commissioners and employees of the Neighborhood Services Department may not serve on the boards of an agency receiving county funds.
Applicant Guidance: • The list must include the following information for each member of the Agency's Board of Directors: member's name, county of residence, profession, and term dates. • Identify all officers of the board, by position.
Agency Approved Bylaws
Purpose of Request: Bylaws are both a legal document and a roadmap for a nonprofit organization's actions. It is an organization's operating manual and tells how an agency should be run.
Applicant Guidance: The bylaws of the agency, approved by the board of directors, and all updates. Must be signed and dated by Chair.

Licenses (if required)
Purpose of Request: If an agency, or professional, is required to be licensed, copies must be provided.
Applicant Guidance: Licenses would include any applicable license necessary to operate or house the proposed program, e.g., program, facility, or professional.
Provide Agency Nepotism Policy (if in place)
Purpose of Request: The agencies nepotism policy outlines how an agency deals with working relationships between those on the board of directors and their staff.
Applicant Guidance: Provide the details or section of the Bylaws that details the nepotism policy that is currently in place.

B – Program Information

6. Tell us about your program.
Purpose of Question: We are looking for a brief paragraph or two with an overview of the program to help the reviewers. Think of it as what you could state in 60 seconds if someone asked what your program is. If quoting statistics, whether local state, or national, please provide source link or upload an appropriate attachment.
Scoring Area: This is not a scored question.
Applicant Guidance: Simply provide an overview of the basics of this program. Provide where program services are provided to Manatee County Clients. Provide the actual days and times program services are provided or available. Also, indicate whether it is school-year only program, or summer only program. You have the option to upload a program flyer (maximum two-pages). Please **do not** use acronyms throughout the application.
Examples: 1. A daily out of school time program that implements a 30-minute reading component for elementary age children with low reading comprehension scores using the nationally recognized ABC curriculum. 2. A 6-week group workshop for parents at risk of repeat child maltreatment using the evidence-based XYZ curriculum specifically designed for this population. 3. A comprehensive adoption preservation program for families at risk of dissolution with ongoing in-home support for the adoptee and parents. The counseling and parent education staff are certified adoption competent and are trained by a subject matter expert in the FGH curriculum.

7. Program **historical information**
Purpose of Question: While not scored it is important to understand the program history to see the program data trends.
Scoring Area: This is not a scored question.
Applicant Guidance: Provide the data called for as it relates to the program specifically in the past three years: • Program Match Funding • Program Participants • Program Staff • Program Contractors

8. Program **match funding** details
Purpose of Question: While not scored it is important to ensure that the program is looking for other funding as a first source and using the millage funds as a last resort. If the programs sole funding is from the CSAB then it is pertinent that the program is looking for a match of funds.
Scoring Area: This is not a scored question.
Applicant Guidance: Please provide details of the requirements for the program to receive match funds. Include the investment amount required to receive the match, other funding sources that are also considered in the match, length of time the match funding is available for, from where the match is coming from, and other necessary or relevant information.

The details regarding match funding are for informational purposes only. However, the details may be considered in the final funding decision.

C – Participant Information

9. Eligibility Categories

Purpose of Question: The use of these funds is restricted to benefit children who qualify for at least one of the following eligibility criteria: abused, neglected, at-risk, or economically disadvantaged as specified in the Children's Services Ordinance (91-42).

Scoring Area: This is not a scored question.

Applicant Guidance: While many of your participants may reflect more than one category, the County's requirement is that all participants served by this funding source must be represented in at least one category. For each applicable section below, you must complete all parts in full. At-risk factors are required to be clearly defined. Any non-applicable sections should state "n/a", or "0".*Clients may fall under more than one of the eligibility criteria, but they must fall under at least one.*

- **Abused or neglected** – Children are in danger of suffering from or have a history of experiencing physical, emotional, educational, or medical maltreatment related to the failure to provide needed age-appropriate care.
  - Describe the method used to verify and determine abused or neglected eligibility criteria.
- **Economically disadvantaged** – Families with children prenatal or ages birth – 17 years lack the money they need for essentials such as housing, food, and transportation, and the opportunities to earn money to pay for them. Household income is 250% or below current federal poverty level guidelines.
  - Describe the method used to verify and determine economically disadvantaged eligibility criteria.
- **At-risk** – Children lack the basic necessities for normal childhood development. They face severe limitations, barriers, or challenges to reaching their potential academically, physically, socially, emotionally, or mentally. They have risk factors or lack protective factors in one or more domains (individual, peer, school, family, or community), or they exhibit, or have a strong potential to develop, behaviors that put them at risk for negative, life-altering consequences.
  - Provide the program definition of at-risk.
  - Describe the criteria and method used to verify and determine at-risk eligibility.

For each applicable section below, you must complete all parts in full. Any non-applicable sections should state "n/a", or "0".

10. Provide the anticipated demographics for the Manatee County participants to be served by the proposed program

Purpose of Question: Our Children's Services Ordinance states that children to be served must be between the ages of birth through age 17. Parents may be served if the program benefits children prenatal through age 17. This data may also be used later to compare proposed vs. actual data after the program year has ended.

Scoring Area: This is not a scored question.

Applicant Guidance:

- Report data exclusively for Manatee County residents anticipated to participate in your service or program in the upcoming fiscal year (October 1 – September 30).
- Overall total is the number of unduplicated participants to be served in the program.
- Age range category: If you serve adults for the benefit of their children, enter total # of adult participants in the parent/guardian category. If you solely serve adults for any other purpose, the program is not eligible for an investment from this funding source.
- Race/Ethnicity category: Report each participant only once, selecting the best fit from the categories provided. Percentages will total 100%.

11. Define **two typical participants**, reflecting between them any significant differences among your participants and describe how your program addresses very specific challenges you define.
Purpose of Question: High performing agencies really know their participants. They know what the issues are, and they know what they need—not just at general levels but in the highly specific terms of actual individuals. If a young participant, for example, comes from a family with a culture that devalues education for girls, we would look for a program that addressed that critical factor—either by changing parent viewpoints or giving the child ways to move forward with other validation.
Scoring Area: 5) Participant Information – Knowledge of participants
Score Range: 0-4 **4 –** They have identified specific individual (not group) challenges or conditions in participants and can describe how they address them with their program. **2 –** Some factors identified for individual, but insufficiently specific or clear; or, factors identified but with no information on how their program is designed to address them. **0 –** Very little individual identification factors are provided.
Applicant Guidance: Please use actual participant examples from your current client base, if possible, but do not use real names. If need be, use composite examples drawn from actual participants. Describe their situation, strengths, and any characteristics important in defining them. Emphasize in the two examples any differences or variations in participants you envision. Make sure you add any ways in which your program is designed to specifically deal with the specific challenges you define.
Examples: • Angela is 10 and in the 4th grade. She is two or more grade levels behind in reading. She is social and seldom a behavior problem. She is, however, distracted and does not readily focus on homework or anything else that looks to her like schoolwork. She has a single mom who is concerned about her and says she tries to limit her time on social media but is not consistently successful. Our program has elements that specifically address her attention span challenge and will make learning more engaging for her. • Jose is 13 and in 9th grade. He has one parent who is incarcerated and is being raised by one parent with support from his grandparents. Through school counselors, it was recommended to his grandparents that he should consider participation in this program to help resolve some anger issues that have been identified during the school day. Upon intake into the program an ACE assessment was completed by his parent on his behalf and his ACE score was determined to be a 4. Our program supports all youth with any determined risk factors and helps to establish protective factors for participants.

12. Tell us how your participants, in comparison to general population, sort out in terms of **level of difficulty** in getting to the result you want them to achieve.
Purpose of Question: The response to this question is another way to see how well applicants understand their participants. It also tells you something about whether the program is reaching those that most need help.
Scoring Area: 6) Participant Information – Level of challenges
Score Range: 0-4 **4 –** Each level of barriers is clear and distinct, and they are serving 80% or more with many barriers. **2 –** Each level of barriers is clear and distinct, and they are serving at least 50% with many barriers and the rest are in the mid to low barriers. **0 –** There is little to no difference between the level of barriers and/or they are serving little to none with many barriers and the majority served have few barriers.
Applicant Guidance: Enter the number you anticipate have, then tell use the kinds of barriers that would put a person in each category. 1. Few barriers to achievement, 2. Mid-range barriers to achievement, and 3. Many barriers to achievement. This question is important to the investor in that the degree of challenge influences the cost. It presumably is much less expensive and time intensive to help a person who is almost to the result finish line than one that is

farther from attaining the result. It also informs approach. The level of intensity and duration needed will likely be higher with a bigger proportion of challenges. Programs should be able to determine barriers at all levels even if the barriers recognized are not for clients being served in this program. Note: After determining the level of barriers, there may be some programs have zero served in a particular level. For example, the program could be serving clients who all fall within *Many* or *Mid-Range* barriers, or the program may serve clients from a combination of barrier levels.
Example: From a prenatal health clinic for pregnant women: • **Few barriers to result:** 15 women, have no health insurance, no primary physician. • **Mid-range:** 40 women, no health insurance, no primary physician, first pregnancy. • **Many barriers to result:** 65 women, no health insurance, no primary physician, first pregnancy, under 20 years of age, single parent, smokes cigarettes, uses alcohol. Suggested approach: First, define the projected number of participants who will have many challenges or a very big challenge getting to the result(s). Then provide a list of the barriers they face. Do the same for the opposite end—those with few barriers in getting to the result. Then consider those with mid-range barriers to achieving the result(s).

D – Difference Made

13. Select the **priorities** your **program** directly strives to support/achieve. The Manatee County Children's **priorities** are listed below. Please read the guidance before considering a selection of a priority.
Purpose of Question: While unscored, this is important. It confirms that the agency is trying to measure one of the priorities and helping move the needle. Second, while you are not giving added value in a score for a priority being selected, you can look at how the agency may in the same program be getting results or broader impacts that cross over to other priorities. Be aware that some agencies may select a priority for which they do not measure a result, and you will need to rule them out as meeting a priority.
Scoring Area: This is not a scored question.
Applicant Guidance: Programs that don't meet a priority are still considered for investment. o Please do not try to make the program goals and services fit into a priority if it doesn't naturally fit. o If your program does not address any of the priorities or related targets, select "No Priority Applicable". o Applicants are not advised to, nor are they asked to obligate the program to solve an issue that is outside of the mission and expertise of the agency. If Selecting one or more priorities: o At least one results should be the total unduplicated number of participants the program plans to serve for the year. o If the result doesn't measure at least 50% of the anticipated participants, a second result should be considered. The second result does not have to measure a priority; however, it needs to provide how the funds are being invested. o If your result statement doesn't include all program participants, there will be an opportunity to explain why they aren't all included in the result statement at the end of the section.

14. What **result(s)** are you committed to achieve for the persons you serve? Provide your result(s) statement(s), include the number of clients anticipated to be served and how many will achieve.
Purpose of Question: This is the heart of Results First investing. You are investing in results rather than funding programs. The response should include the gain that agencies want participants to achieve and the specific aiming point of how many clients will get to the stated level of results. For example, you are looking for a specific level of something good going up or something bad going down. A very slight change constitutes an

improvement, but it needs to be defined at a change level that will make a difference in comparison to the general population or those who don't attend the program.
<u>Scoring Area</u>: 7) Difference Made - Results
<u>Score Range</u>: 0-10 **10 –** The results are both clear and strong. The response is clear about the number of persons who get to a specific level of improvement that can reasonably be verified by behavior. The level of gain specified is high enough to really make a difference. If the program meets a priority, its result clearly speaks to it. **5 –** The gains are somewhat clear and somewhat strong enough, but without enough to fully verify clarity and strength. If the program meets a priority, its result lacks clarity in linking to it. **0 –** The gains are not clear and not strong. They do not specify a number getting to a specific behavior. And as best you can tell, the improvement they note is not strong enough to make for much of a difference. If the program meets a priority, its results have no clarity in linking to it.
<u>Applicant Guidance</u>: Use the format in the examples below in your response. Use the format in the examples below in your response: Of the <u>#</u> *(define the clients being served)*, we anticipate serving,<u>#</u> will achieve***(define the intended result/improvement and priority statement if one was selected)***. Results should have the following characteristics: • They are numbers, not percents. (80% achieving a result is great if the number is 100, but not if it is 10. • They focus on behaviors rather than attitudes or knowledge. It is much easier to verify behavior than such expressions as "empowered" or "higher self-esteem". If helpful, start with a condition or disposition and ask yourself what an empowered person can achieve that a non-empowered one cannot. This gets you to something you can verify. • They specify the amount of change to be achieved. If you simply state that students will improve in reading, then a very tiny increment of improvement would count. If you say they will improve by one grade level or one level on the Florida reading comprehension scale, we know how much gain you will achieve. In most programs there is a threshold level of something good going up or something bad going down that is needed to really make a difference. • They are doable with a big stretch. Set your result high enough to make a real difference, but not so high as to be impossible to achieve. If you set the target quite low such as to be easy to achieve, other applicants in your arena may be more competitive for investment. • They speak to what is achieved at the end of the program, not interim accomplishments that are actually milestones. • They focus separately on different participants. In some programs, there is a result for children, for example, and a different result for their parent or caregiver. In that case, state results separately for each kind of participant. • If you selected one or more priorities (Question 13), there should be at least one result related to each selected priority. If the result doesn't measure at least 50% of the participants a second result is to be considered**.** The second result does not have to measure the priority, it needs to provide information on how the funds are being invested. • At least one result should be the total unduplicated number of participants you plan to serve for the year. • If you only have one result, you may skip the boxes for Result 2 and Result 3.
<u>Examples</u>: • Of the 50 high-risk parents, we anticipate serving, 42 will achieve the behavior goals in the areas which moves them out of the "at-risk range" for child abuse/neglect and they have no new reported instances of child/abuse neglect. • Of the 50 economically disadvantaged 4-year-olds we anticipate serving, 45 will begin Kindergarten equipped with the knowledge and social-emotional skills necessary to be successful.

15. During the program year, what tells you that **participants are on track** to achieve Results. List the participant milestones and verifications for each Result.

Purpose of Question: Traditionally agencies follow work plans, which tell them very little about the relationship between spending money and getting participants to a result. This question asks them to focus on their participants and their progress rather than on what staff does to serve them. As with many other questions in the application, the first audience for this information is the agency that provides it. Once they have milestones, they can manage their programs to achieve them.

Scoring Area: 8) Difference Made – Milestones – Participants on Track

Score Range: 0-6

- **6 –** The milestones focus on participant progress; not what staff does to help participants. The milestones also show that a participant not only participated but made tangible progress.
- **3 –** Some but not all milestones reflect actual participant actions and progress from participation.
- **0 –** The milestones do not focus on participants or does not reflect what participants achieve to make progress toward the results.

Applicant Guidance:

If you only have one result, you do not need to complete anything for Results 2-3. If you have more than one result, you must complete all associated entries for the additional Results.

- Milestones shift the focus, from what the program and staff do to the incremental progress of the participants being served. Given how different this is from the program's work plan, we urge you to look at the worksheet approach provided on our website (**https://www.mymanatee.org**).
- Think of individual participants and how they incrementally progress from the time they enter the program to when they achieve the result. Don't focus on participation, but on getting the needed gain through participation to forecast that they will be successful in achieving the result.
- Define the time for each milestone in terms of how many days, weeks, or months from the starting date you think it should occur. This is especially important if you have rolling start times. With clarity on individuals and information on how many persons are projected to begin in each program month you can readily compute how many persons have achieved each milestone on a monthly and quarterly basis that we will request for reporting.
- In some cases, the milestones are assessments or check points in a standardized program, which is fine. To be milestones, they must be strong predictors of a participant achieving the result.
- Don't wait until your participant is deep into the program to determine a milestone. They should begin at the first possible point they can be observed. This gives you the most time to adjust the program if course correction is needed to succeed.
- Make sure the milestones can be readily verified as part of the program. Data generated and tracked by the program is fine, including what staff "see and hear" from participants that indicates they are making needed progress.
- If you cannot easily find a starting point, an approach that often works is to list your services on a worksheet from enrollment through workshops, trainings, counseling, and anything else done during program service time. For each service, ask: "So what?" What does the participant need to gain from this? Several steps are often needed to achieve one milestone.

Example:

Result:

Of the 50 high-risk parents, we anticipate serving, 42 will achieve the behavior goals in the areas which moves them out of the "at-risk range" for child abuse/neglect and they have no new reported instances of child/abuse neglect.

Milestone 1:

Parents can point to insights from initial assessment and are committed to achieve the set goals in their Parenting Improvement Plan.

Typical time to achieve: 2-3 weeks

Verification: Staff has documented the insights of parents following the initial assessment as well as parent's visible commitment to achieving their goals in the Parenting Improvement Plan.

Milestone 2:

Parents have actively engaged within the first four weeks, demonstrating (not just knowing) new skills learned.

Typical time to achieve: 4 weeks

Verification: Staff has documented evidence of parent engagement in the program through the skills they have seen the parents put into practice during this time in the program.

Milestone 3:

After 8 weeks, parents are advancing toward completion of their behavioral goals within the timelines set in the Parenting Improvement Plan.

Typical time to achieve: 8 weeks

Verification: Parents have made documented progress in the behavior goals and have been demonstrating their skills during supervised home visit observations.

Milestone 4:

Parents have met all goals in their parenting plan, placing them out of the risk range for child abuse/neglect.

Typical time to achieve: 18 months

Verification: There have been no new reports of child abuse/neglect involving the parents.

16. When participants are **not reaching a milestone**, what process or system is used to track progress and determine what interventions may be necessary, and how to apply them?

Purpose of Question: Having milestones is of little use unless they are used. This question asks how agencies will track and respond to failure to meet milestones, including the two key ones of (1) clients being behind in their efforts to achieve the intended result, and (2) failing to generate enough participant engagement to forecast they will actively use a service to make and sustain an improvement. This demonstrates the program's need for having a data system that goes to the front lines, where those interacting with participants often know most quickly when a program is not working.

Scoring Area: 9) Difference Made – Performance Improvement Process

Score Range: 0-4

- **4 –** Response includes a system that monitors and responds to participants and prompts an intervention plan where they fall short; OR the monitoring system proves that participants are reaching the milestones and there is no need to get them on track.
- **2 –** Response has a procedure that guides program staff on making changes once they spot them, but without a systematic prompt in quality control.
- **0 –** Response has little or no forethought on quality control or what to do when persons do not hit milestones.

Applicant Guidance: Having milestones is of little value unless they are used. We are looking for some kind of system or approach you have in place to do the following.

- Monitor information to know at the earliest possible point that you are not getting enough persons to the interim points where they need to be to achieve your result.
- Quite quickly decide just what the problem is. Why is the participant falling behind? This typically requires some kind of conversation with participants who reflect those falling behind on your result trail and certainly great input from front line staff.
- With equal speed, determine changes in program structure, delivery, or other factors and make those changes.

Example:

We use case management software to compile and store data on women in our program—including clinic visits, recorded interactions with their mentor, and case notes staff may choose to add. The software is web based with clear privacy limits, available internally to everyone who needs to track progress. We include milestone entries—e.g., the first time the women get health advice and each time they show evidence of using it.

Our quality assurance lead reads all case notes and other data monthly on all participants. She has published standards she applies to signal when something seems off course. Her first action is working with the direct staff. At least one new intervention is tried within two weeks.

17. Please state **broader (additional) impacts** likely to happen for participants who achieve your results. Include effects on costs as well as additional gains.

Purpose of Question: Nonprofits often find the result question too confining. They want to say more about broader values. This gives them a chance to do so, while retaining the discipline of a focus on actual changes in behavior and conditions. We are not open to vague statements of collaboration or empowerment, (i.e., the agency must say what is achieved by those results or other good things happening).

Scoring Area: 10) Difference Made – Broader impacts

Score Range: 0-2

- **2 –** Response clearly states important and specific impacts that go beyond achieving a result. The added gains are not trivial.
- **0 –** Response states some impacts with some but not great value.

Applicant Guidance: Please be specific in stating other benefits for participants and the organizations that support them. You may have benefits to add such as:

- The cost savings from avoiding use of other supports and services.
- Added gains for participants. Achieving a gain in one area may well bring likely improvements in other areas, especially if the participant has engaged in a way that built capacity.

Examples:

- The average added cost nationally of a low birth weight baby in the first three years of life is $30,000. For the 75 neonatal conditions, we anticipate preventing, the cost savings (to insurers and payers) is $2.25 million.
- The confidence and skill the women in our program build is clearly applicable to gains in many areas, from health and education to housing and food security.
- The economic benefits of quality early childhood interventions are significant, producing a $14-17 return for every dollar invested. A child growing up in poverty who has experienced high quality early education such as we provide is 40% less likely to require special education or to be held back a grade, 30% more likely to graduate from high school and twice as likely to go to college.

18. What measured standard(s) or assessment(s) will you use to **objectively verify** participants achieved the stated results; and what is the evidence that the assessment (or other tool) you will use provides an accurate gauge of the achievement?

Purpose of Question: Many agencies put objective and subjective verification together. We ask two questions to separate them. For example, a survey of participants to look at their satisfaction or reported value received can generate a lot of statistics. But it remains subjective data in that these are opinions of participants. For objective verification, we are looking for data points that are independent of personal views. We are also looking to see if the levels of change (i.e., gold stars or the like) are strong predictors of the result sought.

Scoring Area: 11) Difference Made – Objective Verification

Score Range: 0-4

- **4 –** Evidence is offered that goes beyond opinion in signifying that a result has been achieved. If it involves success on an instrument used by the program, there is evidence that this achievement is strongly connected with the results sought.
- **2 –** The application offers some evidence independent of opinions but without clarity that is sufficient to reflect actual achievement of result.
- **0 –** There is no objective evidence offered or it is so weak as to be as verification of the result.

Applicant Guidance: Funders often ask for an evaluation plan. We are much more interested in integrating assessment into your program to track to and verify success. Think of it this way, how will you know when to celebrate success? By “objectively” we mean that the information does not come from staff or participant point of view. The “subjective view” of staff or the client is addressed in the next question.

A few tips:

- If you are using before and after tools, make sure they focus on changes in behavior, not just retention of information or statements of opinion. Knowledge alone is generally not enough to prompt the changes most participants need to make to achieve a meaningful result.
- Not all assessment instruments, even popular ones, are predictive of success. Some instruments used to proclaim student readiness for school are not strongly correlated to actual early learning in kindergarten and grades 1-3.
- It is not only acceptable, but encouraged, to use observations from those delivering a program to define success. Anchor observations in categories of what is "seen and heard" which are clear reflectors of progress and achievement of changed behaviors or condition.

Objective verification: Capable of being proven by facts independent of a personal feelings, beliefs, opinions, or interpretations.

Examples:

- The imbedded assessments in the Opal River Pre-K curriculum are our yardsticks for school readiness. When a child achieves a ten on this metric, this is a very good predictor of school readiness and actual reading capability.
- We will use available records to determine the number of foster care placements and adoptions that remain intact. We will, however, report to the County on a cohort basis of those we serve to preserve privacy.

19. How will you capture the **subjective view**—the voices of participants—in describing their gain and your role in creating it? Describe your method and content for documenting accomplishments as the participants see them.

Purpose of Question: The reason for a subjective view is that the participant is often the best reporter on what is happening to them—and even better if they have chosen to change a condition or behavior by taking some initiative. The question only has value, however, if it goes beyond satisfaction to look at the changes the person has made; the ways in which the program prompted or at least influenced those decisions, and the level of engagement that forecasts that the gain will be sustained after the program ends.

Scoring Area: 12) Difference Made – Subjective Verification

Score Range: 0-4

4 – Response clearly specifies how participant achievement will be captured—not just opinion, but with examples.

2 – Response includes participant views (such as satisfaction), but without clarity on specific gains.

0 – Response offers little or no element that reflects achievement perspectives on results achieved.

Applicant Guidance: In contrast to the objective in question 15, this one turns to the equally valid subjective view. A few tips:

- Have a way to go beyond participant satisfaction to learn just what elements of the program proved critical to the person to achieve a result.
- If specifying a survey, tell us what's in it and how you follow up to get beneath reported satisfaction.
- When looking at changes in behavior, as for examples. ("Name two things you are doing differently."). If the participants are not the respondents of the subjective views, it should be their parents/guardians, teachers, or other natural support.
- Include consideration of whether the participant thinks the result achieved will last once the program ends. This is of great value to investors.

Subjective view is centered on a person's own mind and perspectives, as opposed to be general, universal, or scientific.

Examples:

- We will use a survey that asks our participants to specify what they are doing differently as a result of our program and the difference that change is making. For those with great changes, and those with little or no change, we will follow up with interviews done by staff not involved in the program to learn just what happened that led to high or low achievement.

- We will produce at least twenty 2-3 paragraph result stories in which participants use their own words to say what happened and whether they think they achieved the targeted result. We will make this meaningful by dividing result stories into high achievement, low achievement, and everything in between, and saying about how many persons are in each category.

20. Is there a **difference in the numbers** served for the Result (above) and the numbers claimed in the demographics (Question 10)? If yes, explain why.

Purpose of Question: Understanding how the investment in funds are being applied to serve clients and what the intended gains are for each client served is necessary. If there are clients who are served by the program, yet not working towards achieving a result, it is important for investors to understand why they have been excluded.

Scoring Area: This is not a scored question.

Applicant Guidance: If your demographics numbers and the total number anticipated to be served in the Results First statement(s) are not equal, please provide an explanation for that difference. If there is no difference enter **NA**.

Example: There were more clients served in the program than indicated in the Results First targets, but due to certain scenarios such as limited attendance and participation, time of enrollment in program year, etc., they weren't all able to be measured with fidelity.

E. Program Success Factors

21. Share your program's **past success**. For the past year ending September 30, tell us how many people participated in the program and approximately how many **achieved the result** proposed result? Or, if a new program, a comparable result?

Purpose of Question: The primary reason is this is the best evidence that an agency will achieve at a high level. What they achieved last year is far more predictive than what they say they will achieve next year. A second reason is that it tells you how good the agency is about recognizing and defining past results. To respond well to this question some structure must be in place to know the answer to past performance.

Scoring Area: 13) Program Success Factors – Past success

Score Range: 0-8

8 – Response reflects clarity on how many clients achieved the result(s) in the past year. If a new program, they either show clarity on success achieved by staff leading the program or client success data is less than a year with the time period clearly indicated.

4 – The response provides some result information, but it was incomplete either because results are not clear, or they did not include everyone presumed to get to the result.

0 – No useful data was provided on past achievement.

Applicant Guidance:

1. Applicants with Results First experience: Provide precise program result data for the past year, or at least a partial year. If data is for less than a one-year period, please indicate the period covered.
2. Applicants with no Results First experience: We realize that some applicants may not have used Results First in the past and may have no good data for the past year. In this case, provide your best estimate and note it as such. In a year, you will have a much easier time providing precise past result data should anyone ask—and they will!
3. Applicants for new programs with no past data: If your program is new and has no past participants, focus your response on the past success of the person(s) who will run the program. If they also have no experience in the program, for which you seek investment, you should make a compelling case for your performance given no data on past achievement.

Examples:

- Full year example: In the year ending September 30, of the 50 economically disadvantaged 4-year-olds we served, 42 began Kindergarten with all the necessary knowledge and skills in terms of cognitive, social and emotional to be successful, only 3 under our target set for the year. The three who did not meet the results moved out of the area prior to completing the program.

- Best estimate example: In the year ending September 30, of the 50 high-risk parents we served, we estimate that at least 40 of them achieved the behavior goals in the areas which moved them out of the "at-risk range" for child abuse/neglect and have had no new reported instances of child abuse/neglect. This is our best estimate based on the data we gathered for the last six months of the past fiscal year and the first six months of the new fiscal year where we experienced an 80% success rate.
- New program example: This is a new program for our agency, and we have not operated a similar program in the past. The director we plan to hire for this program, however, has had great success with very similar programs in Broward County. In selecting her, we verified that she was instrumental in helping the participants get to the result and had an average success rate of 75%, which we plan to use as our target for this program.

22. What specific things has your program **changed over the last year** and what difference did it make in the results your participants achieved?

Purpose of Question: This is another core question. The most attractive investments you can make are to agencies that grow, and change based on experience. As noted in guidance to applicants, investors will pick a program slightly lower in present achievement but great increases in performance in the last three years than a program slightly higher now, but which have flatlined on success. This question looks at the most vital skill needed to learn--acknowledging that something is not working. As Mark Twain put it, "It is tough to learn from mistakes you never made".

Scoring Area: 14) Program Success Factors – Learning

Score Range: 0-4

4 – Changes were made (within the limits allowable if using a core curriculum) that made a difference (learning was achieved).
2 – Changes were made, but difference made is not clear.
0 – No changes were made (no learning was achieved).

Applicant Guidance: This will demonstrate how the program has developed and changed to better meet the needs of participants by starting where they are. A strong learning curve predicts your success over time. Consider two programs at the same level of achievement. If one has been steady at that level, it is likely to continue. If the other has risen in the past two years from a lower level, it is likely to continue to do so and go on to an increasingly higher achievement level. It is our opinion that learning goes beyond what you know now. Learning is the extent to which program experience and knowledge is used to change and adapt in a purposeful manner to support increased achievement with its clients.

If you are using a core curriculum or approach that does not allow for changes, consider the changes that are within your control, such as the people presenting it and interacting with program participants.

Examples:

- We are now putting far more emphasis on our instructors and how they track progress of children in our program, by what they see and hear that signifies engagement, and then intentional use of program for personal achievement in a specific domain. We have increased the number achieving results by over 10% and seen an equal percent decrease in the time it takes our students to get to the result.
- We have learned that we cannot reasonably help the students (roughly half) who drop into our programs with very low frequency. We now identify those who come at least twice a week and stay for at least two hours as the cohort group to which our success metrics apply. The others, we are clear, we are simply keeping safe and, hopefully, happy. While we cannot quantify it yet, the gains in success are very clear from concentrating our time on those students with us for enough time to make a difference. This is reflected in the result set in this application which is much higher than the one set for last year—before we made this change.

23. Define your program by its **major/key elements** and then tell us why you chose this approach as the best way to achieve results. Include any evidence of its effectiveness.
Purpose of Question: This question helps you to gauge the power of the approach an agency is using. While more general, it tells you how clear the applicant is on the key elements in their program and why they have included them as the best way to proceed. Part of that clarity is being concise. Agencies that need long narrative to tell you about their program are less likely to be successful than those who get right to the meat of what they do and why. It may be more important that an agency has clear intention than that you agree with it.
Scoring Area: 15) Program Success Factors - Approach – Key Program Elements
Score Range: 0-4 **4 –** Response provides clarity on specific elements which are clearly important in contributing to success. **2 –** Response is non-specific in identifying elements that contribute to success. **0 –** Response does not identify any elements that contribute to success.
Applicant Guidance: This is your program in a nutshell. Do not provide a work plan or great detail on program activities. Simply provide the 3-4 most important elements of the program in the sequence you use them to achieve the stated results for participants. If you considered or know of other approaches used to achieve this result, please note why you chose the approach you are using instead. On evidence, recognize that most approaches have been used before and some have reached the level of being "evidence-based" or "research-based". If you have information that documents the effectiveness of your approach, summarize it briefly. Please provide links if information is readily available in any format.
Examples: • Our approach has two key elements: 1) to develop a mentoring relationship with expectant mothers at high risk of not getting and following prenatal medical guidance. We see building this relationship (most often through a mentor or adult friend) with the young woman as critical. And 2) we provide support services to the expectant mothers to break down barriers in their path to delivering a healthy baby. These can involve housing, money, or other factors beyond health. Before deciding on this approach, we explored other models such as media campaigns. Our conclusion: no amount of information or pleading, without this mentoring relationship as the key to informing and persuading, would be effective with these young women. Here is a link to a research article supporting our choice. • Our program to strengthen adopting families treats each family differently. We do not go in as a program or guidebook or any other standard stuff that may or may not apply to them. We first establish a relationship based on the assumption that we are resourceful and may be able to help them with any challenges they face. Since the numbers involved are not large, we can approach this based on individual and resourceful relationships. The best evidence we have is that we have been using this approach for three years and none of the 34 families which we work with has experienced an adoption disruption.

24. Note the **level of intensity and duration** of your approach and explain why it is necessary to achieve the result(s) for the persons you are helping.
Purpose of Question: Many agencies implement programs that are not long or intense enough to make a difference for participants. One reason is that they are conditioned to focus on a high count of those who receive services. This question encourages nonprofits to think about what it really takes not just to offer a service, but to ensure that most recipients get to the intended results.
Scoring Area: 16) Program Success Factors – Approach – Program Intensity and Duration
Score Range: 0-4 **4 –** Response is very clear on why the length of the program is the right intensity and duration to make a difference.

2 – Response includes the length, intensity and duration but does not clearly link it to how that gets them to the result.

0 – Response includes no explanation for why a program length or intensity contributes to the result.

Applicant Guidance: Many programs fall short in achieving their results, not because they have a poor approach, but because they do not apply the approach to their participants in need with enough power to make a difference. Provide the level of intensity and duration that you believe is needed for program participants to be successful at achieving the intended result(s). We would rather invest in a lower number of participants if that buys you the time and other resources to have a strong enough effect.

Examples:

- Of the 120 students who come during the school year to our before and after school program, we cannot effectively help the students (roughly half) who drop into our program with very low frequency. To achieve the intended results, our program approach requires participation at least two times per week for a minimum of two hours each day throughout the school year. We have identified a cohort group of 60 students who attend at this frequency for whom our program can make a significant difference, and we will apply our success metrics to this group. The other half, we are simply keeping safe and, hopefully, happy when they drop into our program.
- Our counseling program needs at least 10 consistent weekly sessions to have enough time to build a trusting relationship and make a significant difference in improving the client's mental health.

25. What is the evidence that your **program director** can and will guide the program to achieve its results? Speak first to credentials, degrees, and years of experience. Then describe any attributes or skills that you believe also predict success.

Purpose of Question: The right person is more important than the plan. The question is important in going beyond resume factors or degrees, certifications, and experience to look at the attributes that a program leader need. The leader's ability to hire, keep, and motivate a great staff is easily as important as what they know.

Scoring Area: 17) Program Success Factors – Program Director

Score Range: 0-6

6 – Response clearly shows that the program director is strong in both areas (1) credentials/degrees/ experience, and (2) skills and attributes.

3 – Response clearly shows that the program director is strong in at least one of the areas.

0 – Response does not show that the program director is strong in either area.

Applicant Guidance: The right people are often more critical to success than the right program design or amount of money available. Start by affirming the credentials or degrees that they must have and then add additional qualifications beyond the minimums. On experience, make it directly relevant to the role this person will play in their project.

The second area (skills and attributes) recognizes that capability comes from who a person is as often as or even more than whether they have a master's degree. Speak to who this person is where it makes a difference; and to the specific skills the person has. Generalities such as "a good people person" are too vague to have meaning to us.

Example:

- Credentials/Degrees/Experience: Suzie Johnson, our program director, has the required domestic violence certification and has an MSW, a degree beyond the required bachelor's degree for this role. She has worked in this field for 15 years and fully understands and applies both the legal and procedural framework in her daily work and melds well with the kinds of persons in our program.
- Skills and Attributes: Suzie is the opposite of burned out. She is fresh every day when it comes to engaging with participants and giving them the hope and confidence, they need to be successful. She has a remarkable track record in helping our participants—well above state of local "averages" for achievement. We think this is largely due to who she is as a person.

26. What is the evidence that your **staff or contractors** who directly interact with your participants can and will guide the program to achieve its results? Speak first to credentials, degrees, and years of experience. Then describe any attributes or skills that you believe also predict success.

Purpose of Question: The persons who directly interact with participants are often seen as the program by participants, who care little about plans, missions, logic models or anything else. What they know and what helps them is a person. Factors such as engagement, resourcefulness, and optimism are known to matter. Sadly, traditional funders ignore this factor almost entirely.

Scoring Area: 18) Program Success Factors – Staff or Contractors

Score Range: 0-6

- **6 –** Response clearly shows that all staff interacting with participants are strong in both areas (A. credentials/degrees/experience & B. skills and attributes).
- **3 –** Response clearly shows that all staff are strong in one area.
- **0 –** Response does not show strength for all staff in either area.

Applicant Guidance: The people directly interacting with your participants are the most critical factor in success in many programs. Typically, participants often define the program as the individuals that help them, even more than with program leaders. The ability to engage with participants is critical, and energy, confidence, and other attributes are likely to be more essential than knowledge or knowledge-based credentials. Speak to all staff interacting with participants, not just those viewed as outstanding. Share how credentials or attributes are applied by staff in their interactions with clients, thereby adding value.

Examples:

- Credentials/Degrees/Experience: Melanie Davis is our lead childcare worker and has all required certifications. This is her second year in the field (which she entered after getting her associate degree) so she has limited experience. On the other hand, she has no “old school” thinking and has many ideas that have already proven of great value.
- Skills and Attributes: Melanie is very inquisitive. She asks questions and gets our participants to ask questions. Her curiosity is infectious in a very good way. We have found that when our kids shift from making statements to asking questions, engagement goes up significantly.

- Credentials/Degrees/Experience: We will hire two new staff to help in our afterschool reading program. No credentials are required, and we do not find degrees important as is knowledge of our kids. The people we hire have the experience of having “been there”. These staff are under direct supervision of certified teachers.
- Skills and Attributes: Our new staff selected will be very interested in actual student achievement, whether passing next weeks’ vocabulary test of completing a paper that gets compliments from teachers at school. They will do whatever it takes to make the 6-8 students in their group to get on grade level in reading.

27. Provide the name of any outside entity or individual **who commits to do something for the success of your program**. Then tell us just what they must do and achieve. Upload their one-page written commitment to do so. Do not upload an MOU.

Purpose of Question: Nonprofits are often rewarded for having partners and collaborations. Many are simply a listing of persons who attend meetings together. This question goes deeper to ask if the agency is dependent on other organizations, person, or system to be successful. The first great data point is whether they know who is essential and who is not. The second is if they have commitments, not just nice words about cooperating.

Scoring Area: 19) Program Success Factors – Essential partners committed

Score Range: 0-4

- **4 –** Response names an outside entity or individual with clear commitments to play the specified role and the corresponding document (not an MOU) is uploaded; or the applicant is credible in stating they do not have or need anyone to play a role.
- **2 –** Response identifies an outside entity or individual but without clear commitments to play the specified role and the corresponding document (not an MOU) is uploaded; or the applicant is not persuasive that they need no external partner.

0 – Response is unclear on role and/or commitment is not specific, no commitment is stated; or the applicant is not credible in stating it needs no external partner. There is no uploaded document; or the uploaded document is an MOU in spite of the instructions.

Applicant Guidance: Many programs depend on an outside source to complete an essential task or provide an essential item. An out of school time program may need the school to share data on student academic progress. An outside entity may need to provide theater tickets, books, mentors, or something else you need to be successful. It is important to identify and show evidence that those on whom you rely upon are committed to provide their support as determined. These are specific commitments declaring what the outside entity or individual is doing that supports the success of the program, they are not general statements endorsing a program. The response should only be from an entity or individual that adds value that is necessary for program success; and include a sentence on what they commit to do or provide.

Please upload the **written statement of commitment from the entity or individual**. An example letter of commitment is available to review on the NPA Funding pages of Manatee County Government website. Please do not upload an MOU and do not provide a list of "partners".

Example:

- Jane Doe, President, Young Presidents Association of Manatee County, commits to providing 10 reading mentors who will consistently participate with the youth.

To see an example letter please see the Application Tips page.

https://www.mymanatee.org/departments/neighborhood_services/agency_funding_requirements/apply_for_human_services_funding/application_tips

28. Name any providers to which you may or will **refer participants** for other services and note their evidence of effectiveness. Then add what, if anything, you will do to verify that participants acted on the referral and gained value from acting on the referral.

Purpose of Question: Many nonprofits refer their participants for other services but know little about whether they follow-up or are effectively helped. This question gets to those essential realities that so often determine participant success. The question also signals that the county is not satisfied with the response that "we did the referring—not our job to see if they got better—or even if they went". There are a few instances where follow-up referrals can endanger the client, such as domestic violence, in which the agency is excused from the follow-up process in the best interest of the client.

Scoring Area: 20) Program Success Factors – Referral Sources

Score Range: 0-4

4 – Response either is creditable for not needing any referrals or shows careful selection of referral groups and a way to follow-up to verify use and value of service.

2 – Response shows some kind of follow-up but without showing clear evidence of careful selection or ability to verify use and value of referral.

0 – Response shows little or no clarity on selection or follow-up verification.

Applicant Guidance: Tell us if the providers to which you refer are the only providers available and whether they are affordable. If you have a choice of providers, please note the factors that lead you to select one provider of another. Saying that a provider has staff meeting credentialing requirements is much less persuasive to us than that they have a high success rate in helping clients like those you serve.

On describing your follow-up, be specific about how you track whether the referral led to a visit and whether that visit was helpful to your participants. In the event tracking referrals will endanger the clients you serve, please provide us this information in your response.

Example:

- Providers to which we refer: For housing needs, we refer our participants to Trinity Housing Group. Last year this provider served about 80 participant families, placing 34 in transitional housing and 20 in more permanent rental or owned housing. For those needing more in-depth counseling for mental health, we refer our participants to Healthy Lives. This provider serves about 50 persons a year and about half of these thrive independently within 24 weeks or less of counseling.

- Follow up:
  - We have an agreement with all agencies, to whom we refer our participants, to provide notification within 5 working days once the individual has come in to them for service. We count showing up, not appointments made.
  - For participants, our standard procedure is to call them directly within 10 days of giving them the referral to: 1) verify that they have set an appointment or 2) to prompt them in any way possible to do so. For those not yet connected, we tell them we will call in another ten days. And we do—keeping on this until it is clear for whatever reasons that the referral will not be used. That is very rare given this follow up. We have over a 90% success rate of referrals leading to additional support for our participants.

F. Investments

29. Total investment amount being requested from Children's Services millage
30. Investment amount awarded in the current fiscal year
31. Is the request for an increased investment
32. If this request is for a new program, please explain how it will benefit the children served. If this is a request for an increased investment, please explain how it will positively impact the program. If the request is not for a new program or increased investment, simply state "NA".
Purpose of Question: In an investor mindset, increases in investments should be accompanied by either an increase in Results or demonstrate the need for an increase to maintain program services and performance. In the case of increases as seen through Results, the agency may increase participants or increase the gains that the same number of participates achieve. In rare cases, an agency may make the case that its costs are simply not covered by the revenue they have. All increase requests are worth considering but start with the specifics. All increases must be justified by the data. Utilize the "CSAB Decision Making Guide – Request for Increased Investment" and the "CSAB Tier Process for Requested Increases".
Scoring Area: This is not a scored question.
Applicant Guidance: A request for an increase investment will be considered in accordance with the CSAB's Increase Funding Tier System and the CSAB Decision Making Guide. To access the "CSAB Decision Making Guide" and "CSAB Tier Process", please visit www.mymanatee.org or copy and paste this link into your browser, https://tinyurl.com/yc7wxbsf If the request will support your program serving those on the wait list, include that information here. Clients served from the wait list should also be reflected in the anticipated number of clients to be served in the Results First statement. The increase investment cannot be used to supplant funds.
Example: We are requesting an additional investment of $20,000 to improve the level and intensity of the behaviors results measured to include the improvement in 4 prosocial behavior domains. To accomplish this, we would like to purchase the RELATE Program for Teens, which is computer-based with a proven history of significant increases in these domains, 4 computers, and staff training by a subject matter expert.

33. If an increase is awarded, how does the program anticipate utilizing the increase?
Purpose of Question: It is important for investor to understand how an increase in investment will support the clients as well as the program and its staff.
Scoring Area: This is not a scored question.
Applicant Guidance:

Provide how the increase will be utilized throughout the program. Include the benefits the increased investment will bring to the program as well as the effects the program will experience without the increase.

34. Do you have a waiting list? If yes, provide the information for each of the three year periods.

Purpose of Question: This unscored question tells you about demand. If an agency has a waiting list, it tells you that there is unmet need. If the agency has no such list and has capacity to serve more, the reverse is true. The waiting list also lets you ask great questions, such as "What would it take to eliminate or cut the list in half". The costs per person are likely to be much lower than for those now served. If the agency is asking for an increase, they should be explaining in the prior question, how it affects their waiting list, if applicable.

Scoring Area: This is not a scored question.

Applicant Guidance: Please note the number of persons on a waiting list for the proposed program in each of the years listed.

35. Name two other providers that provide similar programming. Objectively, what do you see as key points of similarity and differences.

Purpose of Question: Agencies and their funders often consider one nonprofit at a time, assuming they are all distinct. Realistically, in almost all fields, there are multiple groups addressing a need. This information helps you look at your options and at least some comparative information as the applicant sees this. The second reason is that the response tells you if the group is aware of and learning from others with similar focus. High performing groups are always benchmarking and exploring possible collaborations based on different strengths.

Scoring Area: 21) Investments – Similar Programs

Score Range: 0-4

- **4** – Response is very clear on both similarities and difference of groups most like them. No judgment on what this means, simply look for clarity.
- **2** – Response is not clear on both similarities and differences—or not fully clear on one.
- **0** – Response is not clear on similarities and differences.

Applicant Guidance: While it is tempting for an agency to say it is unique, most have at least some things in common—at least the general field in which they work. Please name two providers even if you think the similarities are not strong. For key similarities and differences, just state these without judgement of why you think you are better. If your agency is the only one of its kind in Manatee County, please compare with another county. This is meant to be an objective look at similarities and differences.

Example:

Children for Success and Parker Youth Center are two providers we see as similar in that they serve K-12 students with before and after school programs. We are similar in an intent to not only keep children safe and happy but experiencing more academic success and character development. We are different in two ways:

1) We serve a much more defined neighborhood. Our youth come from just two elementary schools, one middle school and one high school.
2) We have defined character development in specific terms--including intentional behavior and giving and getting from others. We track these in terms of observed and self-reported behavior changes. We do not believe other providers in this area do that, although they may do something of that nature.

36. Name any steps you take to reduce the costs of your program.

Purpose of Question: The best way to get money is to need less of it. This question lets you see how the applicant is using all possible approaches to reduce its costs. This question is most relevant for high performing programs. There is little value in reducing costs for a group that achieves at a low level. Consider the uploaded Program Budget when scoring.

Scoring Area: 22) Investments – Cost Reductions/Resource Leveraging

Score Range: 0-6

- **6** – Response reflects they are taking active steps that significantly lower costs in at least one or two areas.
- **4** – Response reflects some cost reductions, but with limited dollar gains.

0 – Response reflects no evidence of cost reduction.
Applicant Guidance: As the adage has it, the best way to get money is to need less of it. Please define any resources you get at no or significantly reduced cost and the percentage it lowered the budget. Primary categories may include: • Volunteers to do work that would otherwise be done by paid staff. • In-kind contributions that substitute for goods and services you would otherwise need to buy. • Purchasing vehicles, equipment or other items used rather than new. Be specific about the value of the resource in terms of lowered cost from having to pay "retail" for everything and everyone. Rather than say that you have 20 volunteers that have a value of $6,000 (20 volunteers each working 20 hours at $15 per hour) speak to the actual savings and the percentage it lowers your budget. In many cases the cost to pay someone to do what volunteers do will be less than their theoretical value given costs and their uneven productivity.
Example: • We have 30 volunteers playing key roles in enrollment, transportation, and verifying results. Their accomplishments would cost us about $15,000 if we had to pay people to perform those functions. This lowered our budget by 5% for the year. • We work out of 1,000 sq. ft. of donated space in the Universal Church. In that immediate area, the annual lease price for that space would be, conservatively, $7,200. This lowered the annual budget by 15%. Our last two vans we bought through lease for a discount of 40% average from their reasonable actual purchase price. Counting anticipated maintenance, the savings for buying used is $8,000. We also had 25 computers donated by the Acme Company, which considered them outdated, but were fine for our use. The cost to buy those computers at a used market rate would have been $7,500. The combination of these reduced our annual budget by 5%.

Uploaded Program Budget					
Scoring Area: **22) Investments – Cost Reductions/Resource Leveraging** (Used in Question 36)					
Applicant Guidance:					
Program Revenues					
	Revenue Source	**FY23/24**	**% of total**	**FY24/25**	**% of total**
A.	Contributions				
B.	Special Events				
C.	Legacies & Bequests				
D.	United Way				
E.	Manatee County Children's Millage				
F.	Manatee County General Fund				
G.	Other Government Grants				
H.	Foundations, Trusts, and Grants				
I.	Membership Dues – Individuals				
J.	Program Service Fees				
K.	Sales to Public				
L.	Investment Income				
M.	3rd Party Insurance				
N.	Miscellaneous/Other Revenues				
O.	Donated Goods & Services (In Kind)				
P.	Total Revenues				
R.	Net Revenues (P - O - Q [Revenue])				
S.	Percent of Budget-MCG Children's Millage				
T.	Percent of Budget- MCG General Fund				
Program Operating Expenditures					
	Cost Centers	**FY23/24**	**% of total**	**FY24/25**	**% of total**
A.	Salaries/Wages				

B.	Payroll Taxes				
C.	Employee Benefits				
D.	Professional Fees (itemization required)				
E.	Supplies				
F.	Postage & Shipping				
G.	Rental & Maintenance of Equipment				
H.	Printing				
I.	Marketing, Advertising, Promotional				
J.	Travel (local)				
K.	Dues & Subscriptions				
L.	Conferences, Conventions & Training				
M.	Specific Assistance to Individuals				
N.	Special Events Expense				
O.	Payments to Parent Organizations				
P.	Telephone				
Q.	Occupancy (rent, mortgage, utilities)				
R.	Insurance				
S.	Miscellaneous Expenses (itemization)				
T.	Donated Goods & Services (in kind)				
U.	Depreciation				
V.	Administrative Expenses (itemization)				
W.	Total Operating Expenses				
X.	Net Operating Expenses (V-T-U)				
Net Revenue – Net Operating Expenses					
Administrative Expenses % (V/X)					

Miscellaneous Expenditure Itemization		
Expense	Current Fiscal Year	Proposed Fiscal Year
Total Miscellaneous Expenditures	$	$

Professional Fees Expenditure Itemization		
Expense	Current Fiscal Year	Proposed Fiscal Year
Total Professional Fees Expenditures	$	$

Administrative Expenditure Itemization		
Expense	Current Fiscal Year	Proposed Fiscal Year
Total Administrative Expenditures	$	$