Washtenaw Coordinated Funders

Ann Arbor Area Community Foundation • St. Joseph Mercy Ann Arbor
RNR Foundation • City of Ann Arbor • United Way of Washtenaw County
Washtenaw County • Washtenaw Urban County

coordinatedfunders.org

2018-2020 PROGRAM OPERATIONS
GRANTEE ORIENTATION

AUGUST 20, 2018
AGENDA

• Welcome and Introductions
• Meeting Goals
• Community Resources (CTAC and Leadership DELI)
• General Requirements & Expectations
• Office Hours
• Website
• Q&A
MEET THE COFU STAFF

Ann Arbor Area Community Foundation
Jillian Rosen, jrosen@aaacf.org
Katie Van Dusen, kvandusen@aaacf.org

Office of Community & Economic Development
Mercedes Brown, brownmer@ewashtenaw.org

Saint Joseph Mercy Ann Arbor
Elisabeth Vanderpool, elisabeth.vanderpool@stjoeshealth.org

United Way of Washtenaw County
Bridget Healy, bhealy@uwwashtenaw.org
Amanda Reel, areel@uwwashtenaw.org

- COFU has a “No Wrong Door” Communication policy
GOALS FOR TODAY

• Become familiar with general requirements and expectations from COFU
• Address any questions and concerns about 2018-2020 funding cycle
CTAC UPDATE

- Community Technical Assistance Center at the Ginsberg Center, University of Michigan
- Aimed at connecting U-M to the social sector to understand & achieve community-level impact
- Emphasis on building capacity to understand, use, and leverage data
- Can assist with:
  - Data Mapping & Visualization
  - Focus Group Design & Facilitation
  - Logic Modeling
  - Survey Design & Administration
  - Story Banking
  - & more!
- Interested? Email: ginsberg.ctac@umich.edu or fill out a request form on the website: https://ginsberg.umich.edu/ctac
LEADERSHIP DELI UPDATE

• What is it?
  "Leadership DELI provides the means for all players in the broader social ecosystem to address leadership challenges of the social sector through a mutually beneficial partnership between nonprofits, a capacity-building organization (NEW), for-profit business (Zingerman’s), and the funding community (Washtenaw Coordinated Funders)."

• Application deadline has been extended to August 23rd

• First Session is September 14th

• Opportunity is available once per Program Operations grant cycle

• Apply via This Link: https://www.surveymonkey.com/r/6HSW2G7
UNITED WAY PARTNER PACKET

- **United Way 2-1-1**: unitedwaysem.org/2-1-1
- **Volunteer Center**: VolunteerWashtenaw.org
- **Mobile Financial Resource Team**: Marshall Averill, maverill@uwwashtenaw.org
- **Meeting Space**: areel@uwwashtenaw.org
- Complimentary Attendance at **UWWC Events** for Agency Directors
  - Campaign Kick-Off, 9/12, 11:30am at EMU Student Center
- **Run a United Way Campaign**: Madeline Mortimer, mmortimer@uwwashtenaw.org
### KEY DATES

- Updated Calendar at CoordinatedFunders.org

<table>
<thead>
<tr>
<th>Month</th>
<th>Events</th>
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| August  | 8/20: Grantee Orientation, 10-11am (Webinar)  
  • Required for grantees new to COFU Program Operations  
  • Strictly optional for returning grantees |
| January | 6-month Check-In Calls (Optional, dates/times TBD)                      |
| May     | Second year contracting process begins, including update/adjustment of service projections. |
| June    | 6/28/19: Year-End Reporting open in Foundant                           |
| July    | 7/1/19: Second grant year begins                                       |
| August  | 8/2/19: Year-End Reporting due                                         |
PAYMENT TIMELINE: PRIVATE FUNDERS

- **Ann Arbor Area Community Foundation**: Lump sum payment July of each grant award year.

- **St. Joseph Mercy Hospital - Ann Arbor**: Lump sum payment in August of each grant award year.

- **United Way of Washtenaw County**: Monthly payments beginning in July of 2018.

PAYMENT TIMELINE: PUBLIC FUNDERS

For Agencies receiving funds through the Washtenaw County Office of Community & Economic Development*: An invoice must be submitted to trigger the disbursement of each advance and must include a request for 25% of the total grant in writing on the agency’s letterhead using the OCED-specific format. Expenditure reports are also required. See timeline below. Questions? Contact Mercedes Brown, brownmer@washtenaw.org.

* For those agencies receiving CDBG funding, OCED staff will email separate instructions for contracts and invoicing.

<table>
<thead>
<tr>
<th>OCED Grant Payment Timeline</th>
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<tbody>
<tr>
<td><strong>Action</strong></td>
<td><strong>Due Date</strong></td>
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<tr>
<td>FY 2018-19 Grant Start Date</td>
<td>July 1, 2018</td>
</tr>
<tr>
<td>Initial 25% Advance</td>
<td>Upon contract execution &amp; receipt of first invoice</td>
</tr>
<tr>
<td>First Expenditure Report Due</td>
<td>No later than October 31, 2018</td>
</tr>
<tr>
<td>Second 25% Advance</td>
<td>Upon submission of second invoice and approval of first expenditure report</td>
</tr>
<tr>
<td>Second Expenditure Report Due</td>
<td>No later than January 31, 2019</td>
</tr>
<tr>
<td>Third 25% Advance</td>
<td>Upon submission of third invoice and approval of second expenditure report</td>
</tr>
<tr>
<td>Third Expenditure Report Due</td>
<td>No later than April 30, 2019</td>
</tr>
<tr>
<td>Fourth 25% Advance</td>
<td>Upon submission fourth invoice and approval of third expenditure report</td>
</tr>
<tr>
<td>Year-end Program Report AND Final Expenditure Report Due</td>
<td>July 31, 2019</td>
</tr>
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Grantee organizations will...

- Act as good stewards of COFU funding
- Use COFU funding in accordance with the Grant Contracts & Partnership Agreement
- Adhere to the expectations for agencies receiving COFU program operations grants
COFU COMMUNICATION GUIDELINES

- All Communications Guidelines outlined in Partnership Agreement
- COFU Logo and usage guidelines on our website
- Static Clings will be mailed to new agencies, and upon request to returning agencies

QUESTIONS?

Submit questions via chat function.
REPORTING RESOURCES

- Where have we been? Where are we now?
  - Replaced 6-month Reporting with optional 6-month phone check-ins
  - Worked with each Priority Area to update the Program Strategies & Outcomes document to further refine and bring consistency to what is being measured for each Outcome
  - Focus is understanding and support, not compliance
- Reporting Resources Available:
  - Draft Year-End Report
  - Program Outcomes & Strategies Summary document
  - Reporting FAQ’s
  - COFU Staff

- See reference documents at www.CoordinatedFunders.org
REPORTING OUTLINE

- Overall Numbers Served & Outcome Indicator Results
- Demographic information
  - Geography
  - Income (FPL)
  - Age (Census categories)
  - Gender
  - Race & Ethnicity
- Volunteers & Interns Data
- Leveraged Funding Received
- Program Implementation Challenges/Barriers
- Open-Ended Additional Information Field
- Most Significant Change
- Participant Story

See reference document at www.CoordinatedFunders.org
REPORTING SPECS

• Opened up and assigned in Foundant in late June/early July
• Due in early August
• Provide year-to-date data on the proposed deliverables agreed upon in Contracting process
• Reviewed by the funders; Feedback, support and monitoring provided as needed
• COFU reserves the right to request data regarding the organization throughout the life of the grant at any time
REPORTING FAQ’S

• See full document at CoordinatedFunders.org

• Common Questions:
  • Reporting of numbers served should reflect your full program, not just COFU dollars.
  • Unless otherwise indicated, always report unduplicated individuals, not “units of service”
  • Report in the unit indicated by the selected Outcome Indicator
  • All demographic totals should add up to Total Number Served. “Unknown” fields are provided for each category
  • Make sure ALL necessary Outcome Indicator fields are completed.
Communications from Foundant

- Automated reminders from Foundant can ONLY be sent to the person to which the proposal is “assigned”.
- Request reassignment of reports or proposal
- Reporting Reminder Emails:
  - When opened, approx. 30 days in advance
  - Reminder 14 days before deadline
  - Past due reminder one day after deadline

Other Broad Communications from Funders

- Leadership and Program contacts provided to us during contracting.
- Changes or additions to agency contacts and agency info can be provided to Katie or Amanda.
FUTURE FUNDING

Funding Renewal Changes

• Program Operations Awards have been made for an initial two year period.
• New this cycle, funding may be renewed for up to three additional years AFTER the first two years (through June 30, 2023)
• Renewal will not require participation in a subsequent RFI/RFP
• Contingent upon available funding, community conditions, and program performance

Why?

• Based on grantee feedback and TCC findings
• Provide more stable support to high-performing programs.
COFU WEBSITE

• All Grantee Resources and Information Posted:
  • https://coordinatedfunders.org/funding-streams/program-operations/granteeinfo/
• Quick Demo
OFFICE HOURS

• Any lingering questions or concerns that you would prefer to address with the funders in person? Come to Office Hours!
• September 12, 1-5pm at OCED
• September 20, 10-1pm at AAACF
• Sign up for a 30-minute slot via this Google doc: https://docs.google.com/spreadsheets/d/1I8ZRGHlU2C1ba yxrNXM5t3RBLVUdB50zR9hZ9Ezm-yE/edit?usp=sharing
QUESTIONS & NEXT STEPS

Now: Questions? Comments? Concerns?

Soon: Watch for survey to gather reporting feedback