

# 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](http://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](mailto:jrosen@aaacf.org)

Katie Van Dusen, [kvandusen@aaacf.org](mailto:kvandusen@aaacf.org)

## **Office of Community & Economic Development**

Mercedes Brown, [brownmer@ewashtenaw.org](mailto:brownmer@ewashtenaw.org)

## **Saint Joseph Mercy Ann Arbor**

Elisabeth Vanderpool, [elisabeth.vanderpool@stjoeshealth.org](mailto:elisabeth.vanderpool@stjoeshealth.org)

## **United Way of Washtenaw County**

Bridget Healy, [bhealy@uwwashtenaw.org](mailto:bhealy@uwwashtenaw.org)

Amanda Reel, [areel@uwwashtenaw.org](mailto: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](mailto: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](http://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 [CoordinatedFund.org](https://CoordinatedFund.org)

August	<ul style="list-style-type: none"><li>• 8/20: Grantee Orientation, 10-11am (Webinar)<ul style="list-style-type: none"><li>• Required for grantees new to COFU Program Operations</li><li>• Strictly optional for returning grantees</li></ul></li></ul>
January	<ul style="list-style-type: none"><li>• 6-month Check-In Calls (Optional, dates/times TBD)</li></ul>
May	<ul style="list-style-type: none"><li>• Second year contracting process begins, including update/adjustment of service projections.</li></ul>
June	<ul style="list-style-type: none"><li>• 6/28/19: Year-End Reporting open in Foundant</li></ul>
July	<ul style="list-style-type: none"><li>• 7/1/19: Second grant year begins</li></ul>
August	<ul style="list-style-type: none"><li>• 8/2/19: Year-End Reporting due</li></ul>



## 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.
- *See reference document at [www.CoordinatedFund.org](http://www.CoordinatedFund.org)*

# 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.**

OCED Grant Payment Timeline	
Action	Due Date
FY 2018-19 Grant Start Date	July 1, 2018
Initial 25% Advance	Upon contract execution & receipt of first invoice
First Expenditure Report Due	No later than October 31, 2018
Second 25% Advance	Upon submission of second invoice and approval of first expenditure Report
Second Expenditure Report Due	No later than January 31, 2019
Third 25% Advance	Upon submission of third invoice and approval of second expenditure report
Third Expenditure Report Due	No later than April 30, 2019
Fourth 25% Advance	Upon submission fourth invoice and approval of third expenditure report
Year-end Program Report AND Final Expenditure Report Due	July 31, 2019

# GENERAL REQUIREMENTS AND EXPECTATIONS

## **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

*See Partnership Agreement and reference document at [www.CoordinatedFunders.org](http://www.CoordinatedFunders.org).*

# 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.CoordinatedFund.org](http://www.CoordinatedFund.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](http://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 [CoordinatedFund.org](http://CoordinatedFund.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 TO GRANTEES

## 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/1I8ZRGHLI2C1bayxrNXM5t3RBLVUdB50zR9hZ9Ezm-yE/edit?usp=sharing>

# QUESTIONS & NEXT STEPS

Now: Questions? Comments?  
Concerns?

Soon: Watch for survey to gather  
reporting feedback