

AGENCY NAME:

REQUEST FOR INFORMATION

#6855

COORDINATED FUNDING:
Agency Eligibility for
Human Services Program Operations
FY2016-2018

Issued By:

Washtenaw County Purchasing
Administration Building
220 N. Main Street
Ann Arbor, MI 48104

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**WASHTENAW COUNTY
FINANCE DEPARTMENT**
Purchasing Division

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REQUEST FOR INFORMATION 6855

September 9, 2015

Washtenaw County Purchasing Division on behalf of the Washtenaw County Office of Community and Economic Development, in partnership with the City of Ann Arbor, United Way of Washtenaw County, the Washtenaw Urban County, and the Ann Arbor Area Community Foundation, is issuing a Request for Information (RFI) #6855 to human service-providing¹ non-profit agencies located in Washtenaw County. This RFI process is a single point of access for agencies meeting basic eligibility to apply for Human Services Program Operations and/or Capacity Building funding through the upcoming Coordinated Funding Request for Proposals (RFP) and Capacity Building grants process. If an agency fails to submit a completed response to this RFI by the deadline (see below), that agency will be ineligible to apply for Human Services Program Operations and/or Capacity Building funding from the City of Ann Arbor, Washtenaw County, the Washtenaw Urban County, United Way of Washtenaw County, and the Ann Arbor Area Community Foundation through the Coordinated Funding RFP and/or Capacity Building grants process for FY 2016 to 2018.

Several informational meetings will be held. Attending one of these is **mandatory** for any agency wishing to apply for the RFI. Space is limited. Please visit www.coordinatedfunders.org to RSVP:

- Wed, Sept 16, 10am, United Way of Washtenaw County, 2305 Platt Rd, Ann Arbor
- Thu, Sept 17, 3pm, Learning Resource Center, 4135 Washtenaw Ave, Ann Arbor
- Mon, Sept 21, 3pm, Office of Community & Economic Development, 415 W Michigan Ave, Ypsilanti
- Tue, Sept 22, 10am, Washtenaw Intermediate School District, 1819 Wagner St, Ann Arbor

Proposals: Agency will submit their completed RFI response to the Washtenaw County Purchasing Division and the Washtenaw Coordinated Funders via the Foundant system:
<https://www.grantinterface.com/washcofu/Common/LogOn.aspx>

Proposals must be submitted:

by Friday, October 2, 2015 at 11:59 p.m. est.

¹ Human services categories include: Early Childhood, School-Aged Youth, Safety Net Health & Nutrition, Housing & Homelessness, and Aging.

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Proposals received after the above cited time will be considered a late request and are not acceptable.

Please direct questions regarding submission of this RFI to Amanda Reel, Community Impact Manager **via email only** at areel@uwashtenaw.org.

Please direct purchasing and procedural questions regarding this RFI to Angela O. Perry **via email only** to perrya@ewashtenaw.org.

Please see frequently asked questions regarding this RFI at www.CoordinatedFunders.org.

Definitions:

"Agency"	is a human service organization providing services in Washtenaw County to Washtenaw County residents.
"City"	is the City of Ann Arbor in Michigan.
"County"	is Washtenaw County in Michigan.
"United Way"	is United Way of Washtenaw County.
"Urban County"	is the Washtenaw Urban County, the CDBG entitlement community including the following municipalities: Ann Arbor Township, Bridgewater Township, Dexter Township, Manchester Township, Lima Township, the City of Ann Arbor, the City of Saline, the City of Ypsilanti, Northfield Township, Pittsfield Township, Salem Township, Saline Township, Scio Township, Superior Township, Webster Township, York Township, Ypsilanti Township, and Manchester Village.

Purpose of Proposal:

In keeping with best practices in non-profit management, and to ensure appropriate stewardship of local human services funding, the following entities will require all potential applicants to the FY2016-2018 Coordinated Funding Human Services Program Operations RFP (to be released in January 2016) and Capacity Building application (to be released in October 2015) to complete this Request for Information (RFI).

The documents requested and questions answered as a part of this RFI will be used as the basis for review of agency financial and organizational capacity, and as indicators of an agency's ability to perform proposed activities, in order to determine which human services-providing agencies will be eligible to apply for Human Services Program Operations and/or Capacity Building funding from the following entities:

**United Way of Washtenaw County
Washtenaw County
City of Ann Arbor
Washtenaw Urban County
Ann Arbor Area Community Foundation**

The documents and responses requested through this RFI are fundamental to any well-conceived and functioning human services organization, and should be readily accessible to those organizations intending to apply for and receive human services funding. Additionally, the

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purpose of conducting the RFI process (agency evaluation) separate from the RFP (program evaluation) and Capacity Building application is to acknowledge the request from multiple agencies to allow a staggered timeline for submission of required documents. It is our hope that this multi-step process will alleviate the burden on agencies, allow for a more streamlined application process, and identify agencies that will most benefit from capacity building investment.

Background:

In an effort to further the improvements realized through the existing public-private coordinated funding process currently employed by Washtenaw County, the City of Ann Arbor, the Washtenaw Urban County, United Way of Washtenaw County, and the Ann Arbor Area Community Foundation, as recommended by an independent evaluation from the TCC Group in April 2013, this partnership will continue to emphasize sound practices with clear and measurable program outcomes. The Washtenaw Coordinated Funders have adopted a community impact model where program strategies align with identified community-level outcomes. Toward this end, the partnership will continue to encompass three funding components: Planning & Coordination, Program Operations and Capacity Building. This RFI is the first step in the application process for the Program Operations and/or Capacity Building funding for FY2016-2018.

Proposal Terms:

The Office of Community and Economic Development, United Way of Washtenaw County, and the Ann Arbor Area Community Foundation reserve the right to reject any and all proposals received as a result of this RFI. Agencies which demonstrate a basic eligibility to provide the specified services will be eligible to respond to the RFP to be issued in January 2016. Agencies that wish to apply for capacity building funding or demonstrate a need through the RFI process will be eligible to submit the Capacity Building application to be issued in October 2015. In the event it becomes necessary to revise any part of the RFI, addenda will be provided. Deadlines for submission of RFI's may be adjusted to allow for revisions.

To be considered, one (1) **completed online application** of the RFI and required agency documents must be received by the County Purchasing Office and the Coordinated Funders through the Foundant online system (link provided) on or before the date and time specified:
<https://www.grantinterface.com/washcofu/Common/LogOn.aspx>

Proposal Specifications:

The proposal should include all of the following information.

Basic Information

1. Which of the following best describes your organization? 501(c)(3), Applying via a fiscal agent, Governmental Entity, School District, Other Educational Institution
2. Agency Mission Statement
3. Has your agency previously applied for Coordinated Funding?
4. Does your agency have a physical location in Washtenaw County?
5. Provide the addresses of your service locations (up to four) based on service volume.
6. Agency Service Area: Washtenaw County Only or Multi-County or State
7. If you selected the Multi-County or State option above, enter the approximate number of participants from Washtenaw County served annually by your organization.
8. If you selected the Multi-County or State option above, enter the approximate percentage of participants from Washtenaw County served annually by your organization.

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Application Details

9. Are you applying for Program Operations funding?
10. If yes, please enter the program names and associated priority areas for which you plan to seek program funding. (*This is for informational purposes only. Your agency can elect to apply under a different priority area at the time of the RFP.*)

Capacity Building Information

11. Is your agency interested in being considered for a capacity building grant? Capacity building grants are intended to increase a nonprofit's effectiveness across areas of operations, leadership & governance, fundraising, and program/service delivery in the community. NEW | Solutions for Nonprofits will provide Capacity Building and Project Management services to the selected grantees.

If yes:

- a. Tell us about your agency's capacity. Of the following areas below, please identify the top five in terms of desire for improvement to advance your agency's mission:
 - Board Recruitment
 - Board Development
 - Collaborations/Partnerships
 - Communication & Marketing
 - Diversity & Inclusion
 - Financial Management
 - Fundraising/Development
 - Human Resources
 - Performance Management
 - Program Evaluation
 - Public Policy/Advocacy
 - Risk Management
 - Strategic Planning
 - Service Delivery
 - Technology
 - Transparency
 - Volunteer Engagement
 - Other
- b. Describe the top two needs you identified above. Why are these needs the most desired areas of capacity building for your agency at this time?

Organizational Details

12. Submit the following organizational documents:
 - a. 501-c-3 determination letter (*for any applicant not currently funded by either the United Way of Washtenaw County or the Office of Community and Economic Development*)
 - b. 2015 Michigan Solicitation License, or plan to obtain 2016 license.
 - c. Organizational chart with staff names and position titles identified (For agencies with less than three (3) employees, please supply a list of employee names and corresponding position titles)
 - d. Current governance body roster using provided template (*Must include term limits, tenure, committees, and officers; see Attachment A*)
 - e. Board or Governance Body's minutes reflecting last 13 months of governance through August 2015 (*Handouts/attachments/etc. not necessary; please only provide the Board minutes*)

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13. Submit the following financial documents:

- a. If Annual Total Revenue of \$500,000+:
Most Recent independent audit and submission of SAS114, and 115, if applicable.

If Annual Total Revenue of \$250,000 or more and less than \$500,000:
Prefer submission of independent financial audit and of SAS114, and 115, if applicable. If this is not conducted, then submission of an independent financial review is required.

If Annual Total Revenue of less than \$250,000:
Prefer submission of independent financial audit and SAS114, and 115, if applicable - or independent review. If neither of these is conducted then submission of the most recent Board approved fiscal year financial statements and IRS submission.
- b. Most Recent Form 990 as submitted to the IRS
- c. Current year Board-approved agency budget

Note: The Washtenaw Coordinated Funders reserve the right to request evidence regarding responses to the below questions as part of the funding process.

14. Has your organization's board of directors held a minimum of 4 meetings over the last 12 months?
15. Do any of the Executive Director/CEO's family members serve on the organization's board of directors?
16. Did your board or governance body formally approve your current fiscal year budget?
17. Enter date of approval or provide additional context for a "no" response.
18. Does your organization have a current strategic plan?
19. Does your organization affirm that it is in compliance with the following Federal Directive on non-discrimination Standard of Voluntary Health and Welfare Services?
 - No person is excluded from service because of race, ethnicity, gender, age, physical disabilities, sexual orientation or gender identity.
 - There is no segregation of those served on the basis of race, ethnicity, gender, age, physical disabilities, sexual orientation or gender identity.
 - There is no discrimination with regard to hiring, assignment, promotion or other conditions of staff employment on basis of race, ethnicity, gender, age, physical disabilities, sexual orientation or gender identity.
 - Governing bodies are open to representation from all segments of the public, regardless of race, ethnicity, age, gender, physical disabilities, sexual orientation or gender identity.

Evaluation Information:

The list above identifies all the required documents and responses to be submitted as a part of this RFI. Agency documentation will be reviewed by staff and volunteers with expertise in finance and/or management during the month of October 2015 and used to identify any agency financial or organizational capacity concerns prior to the program operations application process.

The following non-exhaustive criteria will be used to evaluate agencies:

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1. Service delivery in Washtenaw County.
2. Completion and submission of all required financial/organizational documents above.
3. Evaluation of agency's fiscal health as verified by review of minutes, current audit or independent financial review, or the Board approved fiscal year-end financial statements, and IRS submission.
4. Active engagement of the Board of Directors as verified by past 13 months of formal Board minutes.

All agencies responding to this RFI will be notified prior to the release of the RFP and Capacity Building application whether or not they are eligible to apply. If an agency does not meet the above criteria of this RFI, it will not be eligible for Human Services Program Operations funding in the FY2016-2018 RFP (to be released in January 2016).