

## ESSENTIAL NEEDS

### Accountability (10% of total points)

1	Agency attended quarterly Agency Director's Meetings
2	Program data was submitted on time

### Program Description (20% of total points)

<b>What We Do - Program description under "What We Do" includes:</b>	
3	Brief description of the agency, specific to Central Iowa if part of a larger entity
4	A clear and concise description of how the UWCI funded program operates
5	Specific information about how UWCI funds will be used in the program (what services UWCI would support)
6	Description of how services are delivered, emphasizing best practices to meet the clients' needs
<b>Who We Serve - Program description under "Who We Serve" includes:</b>	
7	Description of the population, including underserved (low income, special needs, refugees & immigrants, ex-offender, etc.) served by the UWCI funded program, including eligibility criteria and geographic location (county, high risk neighborhoods, etc.)
<b>How We Impact* - Program description under "How We Impact" includes:</b>	
8	Description of how program is contributing to help individuals get beyond the services provided
9	Description of how program is impacting the community need
<b>Success Story</b>	
10	Success Story related to UWCI investments is provided (Essential Needs focus)
11	UWCI Release Form is provided for the Success Story

### Results Accountability/Program Performance (70% of total points)

<b>Performance Measures</b>	
	Data is completed for through 12/31/16
<b>Story Behind the Curve</b>	
12	Description of what the program is designed to accomplish
13	Description of the successes and the challenges that this effort has encountered
<b>Partners</b>	
14	Description of partners and/or collaborations, including existing and potential partnerships, and the role that key partners play
15	Description of leveraged resources for the funded program, including volunteer hours, match dollars or other funding partners that support the work
<b>What Works (what you've learned and what enhancements you could make)</b>	
16	Description of research / best practices that apply to the program and what is guiding the work
17	Description of volunteer and advocacy efforts (local or national) that could help enhance the work the program is doing in the community, including how UWCI can assist
<b>Action Plan*</b>	
18	From actions described under 'What Works', describe specific, data driven actions and/or program improvements the program will take within the next year (short-term) to reach successful outcomes for clients
19	From actions described under 'What Works', describe specific, data driven actions and/or program improvements the program will take within the next 3-5 years (long-term) to reach successful outcomes for clients
20	Description of specific program improvements underway or to be implemented
21	Description of low cost or no cost solutions and additional resources that would be required to fulfill the action plan
22	List of suggested performance measures for Essential Needs program

\* Considered key and are weighted to reflect this level of importance.

## FY18 UWCI Investment Process

### Tips for Success



#### 7 Success Story Components:

- 1- Describe the person who this story about, including personal attributes
- 2- Describe what happened to this person in their life stages, living/working/school environment, etc.
- 3- Describe what happened that makes this person set a goal or begin to change their circumstance, behavior or attitude
- 4- Explain what barriers were encountered while they were working towards the goal or change that may have caused a struggle to overcome
- 5- Describe how they overcame the obstacles, including organizations, programs and people who made a difference as they worked toward the goal or change
- 6- Describe what happened/outcome when the goal or change was achieved or lessons learned along the way
- 7- Describe what will happen next, give credit for assistance given or lessons learned, and project how the story will make in our community

#### Putting Your Best Foot Forward During United Way of Central Iowa Investment Meetings:

Community volunteers and United Way of Central Iowa staff want you to feel comfortable and be successful during your investment meetings. Here are some tips on how to present most effectively.

Come on time and keep the allotted time in mind; other groups may be waiting to present.

Come prepared. Everyone representing your organization should be familiar with your data and the contents of your Scorecard. You may want to meet prior to the investment meeting to review your information.

- 1- Bring the people with you who are most familiar with your agency so you can answer questions effectively. Consider a board member and a client.
- 2- Answer questions honestly; we are all learning and growing.
- 3- Be positive! We all want to continue to improve, and volunteers do not expect perfection.
- 4- Do not bring piles of materials with you. Volunteers are more interested in listening to what you have to say than thumbing through multiple documents.
- 5- If you don't know the answer to a question, you can respond that you will find out and get back to the group.
- 6- Share a picture and a story! Leave the volunteers with something to remember.
- 7- Identify who will answer the questions first, so it is clear for your team.
- 8- Ask questions so you leave feeling that you are informed and ready for the next year.

#### Study Hall

Come to ask any questions regarding the investment process, Scorecard, and Andar / Community Builder

Thursday, January 5th	3:00-5:00
Monday, January 9th	1:00-3:00
Wednesday, January 11th	8:00-10:00

All sessions will be located at UWCI, Room 4