



**Application Instructions for the
Pew Fund Capacity Building Program Award Proposal**

**Equal Measure
(formerly OMG Center for Collaborative Learning)**

**Spring 2015 Application
Award Period: 9/1/2015-8/31/2016**

For additional information, please visit [our website](#) or contact Stephanie Lerner by phone at 215.732.2200, ext. 225 or by email at slerner@equalmeasure.org.

Background

This Request for Proposals for the Pew Fund Capacity Building Program follows the earlier request for Letters of Inquiry distributed in May 2015. After a careful assessment of the LOI submissions, your organization is invited to submit a full proposal.

About the Program

The purpose of the capacity building program is to help organizations identify and address their most pressing organizational needs. Organizations can apply for funding in one of four areas:

1. **Management information systems design and development**—securing hardware, securing and/or designing software, and building related staff skills necessary for managing work more effectively, e.g. for tracking client demographic data, service utilization, and progress toward outcomes.
2. **Financial management and planning**—assessment, planning and development of financial systems, as well as staff skill building to improve reporting systems and enable organizations to identify the most cost-effective services.
3. **Evaluation and outcomes system development**—increasing staff knowledge and understanding of evaluation and developing MIS and other internal systems for assessing program effectiveness. *Please Note: Requests to fund a program evaluation must simultaneously demonstrate how the project will build the organization's capacity for outcomes thinking.*
4. **Leadership succession and next tier leadership development**—planning for and implementing strategies for the development of new leaders and/or leadership transitions through identification of leadership needs, development of internal leadership capacity for mid-level management and future executive leaders, and executive leadership succession planning and recruiting.

Application Process

As one of the invited organizations, you are asked to elaborate upon your LOI application. The information we are requesting in this application will be very similar to that of the LOI; however, we would like greater detail about your proposed project as well as additional supporting documents. The deadline for submitting the proposal is: **Friday, July 10, 2015, no later than 5:00 p.m.**

To submit the proposal, please email one compiled PDF of all materials to slerner@equalmeasure.org with the subject line "Spring 2015 Pew Capacity Building Proposal." Facsimile and hard copies will not be accepted.

All proposals must include:

- Proposal Cover Sheet (see page 6)
- Proposal Narrative (see pages 3 - 5)
- Assessment Plan and Outcomes Table (see pages 10-11)
- Budget Form and Narrative (see pages 8 and 9)
- Timeline for project implementation and completion (including tasks associated with measuring project outcomes)
- Resumés of key staff, job descriptions for new positions, and resumes or informational materials on consultants (if they have been identified). All resumés should be current. If you have a proposal from a vendor or consultant, please include it.
- Copies of data collection and outcomes measurement instruments that will be utilized, if available.

For additional information regarding the application process and other helpful resources for the Pew Fund Capacity Building Program, please visit [our website](#).

Applicants will be sent an email acknowledging receipt of their proposals and will be notified in mid-August of their status.

Review Criteria

Proposals will be assessed according to the following criteria:

- The likelihood that the proposed project will significantly improve the organization's capacity to achieve its mission and serve its clients more effectively and with greater administrative efficiency.
- The relevance and integration of the project to the organization's overall organizational strengthening/development/strategic plan. (The proposed project must fit within one of the four funding areas above, and all project activities *must be related to achieving the capacity building goal.*)
- Demonstration of a well-researched and planned implementation process that includes clearly defined and achievable workplan with tasks and outcomes, as well as an adequate assessment of the resources needed to successfully complete the project, including associated staff time and commitment. *Preference will be given to organizations that incorporate capacity building project planning work prior to the start of the award period (e.g., consultant/software/vendor selection, funding commitments, technology assessments, etc.).*
- The appropriateness of the project budget relative to the scope of the proposed activities and the degree to which the organization has in place other needed resources to achieve the project's goals.

Application Format

Applications must be compiled into one PDF following the order of the Proposal Packet Checklist (see page 6).

The proposal narrative must not exceed 8 single-spaced pages. Please number each page of the narrative and use a 12-point font (or a font size equivalent to Times New Roman at size 12). In preparing the 8-page narrative please use the following outline:

Abstract

- Provide a one-paragraph abstract of the proposal, identifying: the applicant agency and the population it serves; the nature of the organizational issue to be addressed; the capacity-building activities to be undertaken; and a summary of anticipated outcomes or benefits to be achieved.

Section A: Statement of Need

- Describe the goals and objectives of the proposed project and how it relates to other capacity building or organizational improvement efforts at your agency. Describe the organizational problem to be addressed, why it is important to undertake the proposed project at this time, and the anticipated impact this project will have on the organization's clients and its ability to deliver services effectively.

Section B: Workplan and Timeline

- Describe *in detail* the activities to be undertaken, as well as the timeframes and milestones of the proposed activities, noting any prior work that may already have been undertaken in preparation of these proposed activities. Your workplan should include activities associated with measuring the outcomes of the capacity building project. Please also ensure that your workplan and timeframe is aligned with the timeline for the disbursement of funds for the award period. The award period for this one-year project is from **9/1/2015 – 8/31/2016.**

Section C: Capacity of Team

- Describe the key staff, board, volunteers and/or consultants to be involved in the proposed activity: provide (as attachments) resumes and/or job descriptions for key staff. If consultants have already been identified, attach their resumé. If consultants will be selected, include a list of desired qualifications and selection criteria.
- For information technology requests, include information about: hardware and software currently in use; the technical expertise of staff; plans for phasing in new technology; anticipated staff training needs; and how the new systems would be supported after the award period ends.

Section D: Organizational Background

- Briefly provide a profile of the organization (e.g., history and mission, programs and services, populations served, major funding sources, annual income and size of staff.).
- Briefly describe any significant changes in the organization over the last three years (e.g., shifts in leadership, management, funding) and provide an overview of any significant organizational changes likely to occur in the next three years.
- Briefly describe any previous capacity building award(s) received through the Pew Fund for Health and Human Services and their impact on your organization.

Assessment Plan and Outcomes Table

You will need to complete an Assessment Plan and Outcomes Table (attached). Please attach one set of these materials to each of the three copies of the proposal narrative. [Click here](#) for examples of outputs and outcomes.

Assessment Plan

Please fill out the Assessment Plan Form (attached). It includes a description for assessing the project's impact on the organization's performance and on its clients. Please also identify the staff responsible for ensuring that the assessment plan is carried out, and the activities and timeline planned for the assessment.

Outcomes Table

The Outcomes Table should summarize key outputs, short-term and intermediate outcomes, indicators of those outcomes, and methods of data collection for the assessment.

Budget Worksheet and Narrative

You will need to complete a Budget Form and a Budget Narrative (see pages 8-9). Please attach one set of these budget materials to each of the three copies of the proposal narrative. For a Microsoft Excel copy of the budget worksheet please see the link provided at: <http://www.equalmeasure.org/programs/capacity-building-program-for-the-pew-fund-for-health-and-human-services/#apply>

The totals for some columns will be automatically filled for you, to reduce error. We ask that you use this form, and let us know promptly if you experience any problems with it.

Budget Form

- The overall project budget should reflect all income and expenses for the project in the timeframe for which support is requested. Please request Pew Fund Capacity dollars. Awards typically range from \$20,000 to \$45,000. Also, note any other funding in place for the requested Pew capacity building activity, and specify sources if known. *Preference will be given to organizations that have secured additional funding for the project.*
- Total revenues must equal the exact dollar amount of total expenses.
- Leave blank any budget lines that are not applicable to this request.
- Equal Measure/Pew Fund cannot pay for costs incurred prior to the date the project is approved.
- Note that indirect costs are limited to *no more than 10 percent* of salaries and employee benefits of staff *directly covered* by the Pew Fund award for which you are requesting support. Describe any indirect cost allocations in the Budget Narrative. Please also note, core support for staff will not be funded through this project. Salary expenses allotted to the Equal Measure/Pew Award *should not exceed 15 percent* of the project's total budget.

Budget Narrative Guidelines

A detailed Budget Narrative of expenses must accompany the Budget Form. If there are any uncertainties about the amounts, provide a brief explanation (see the sample Budget Narrative on page 9). The Budget Narrative must include both dollar amounts and a description of how those amounts were determined.

PROPOSAL PACKET CHECKLIST

- Proposal Cover Sheet**
- Proposal Narrative (Please see guidelines in the "Application Format" section on pages 4-5. The proposal narrative must not exceed 8 single-spaced pages. Please number each page of the narrative and use a 12-point font. The first page of the narrative must be on organization letterhead)**

- Assessment Plan and Outcomes Table**
- Project Budget Form**
- Budget Narrative**

Attachments

- Project Timeline**
- Key Program Staff Resumés**
- Consultant Resumés or Description of Consultant Qualifications or Proposals, as applicable**

Please email ONE compiled PDF of all materials (compiled in the order listed in the proposal packet checklist) to: slerner@equalmeasure.org with the subject line "Spring 2015 Pew Capacity Building Proposal"

Proposals must be submitted **by Friday, July 10th, no later than 5:00 p.m.** Proposals will not be accepted via facsimile. Any applications received later than the deadline will not be considered.

For additional information on preparing your proposal, please visit our website at:

<http://www.equalmeasure.org/programs/capacity-building-program-for-the-pew-fund-for-health-and-human-services>

**Equal Measure
Pew Fund Capacity Building Program**



**Proposal Cover Sheet
Spring 2015**

Organization Name: _____

Address: _____

City: _____ Zip Code: _____

Web site (if applicable): _____

Contact Person for this Proposal: _____ Telephone: _____

Contact Email: _____ Fax: _____

Counties in which project will be implemented (check all that apply):

Bucks Chester Delaware Montgomery Philadelphia

Current Pew Fund Service Delivery Grant (check all that apply)

Children Youth and Families Vulnerable Adults Elderly

Since January of 2006, how many times has your organization:

- Submitted an LOI for a Pew Fund capacity building award (*not including this round*)? _____
- Submitted a full proposal for a Pew Fund capacity building award (*not including this one*)? _____
- Been funded for a Pew Fund capacity building award? _____

.....
Funding Category

Indicate to which funding category your request applies (check only **one**):

Management information systems design and development Evaluation and outcomes systems development
 Financial management and planning Leadership succession and next tier leadership development

.....
Agency's most recent annual operating budget: \$ _____ FY ends: _____ (month/year)

Total cost for proposed activities: \$ _____ Staff size (FTE): _____

Amount of Pew Fund support requested: \$ _____

Project funds from all other sources: \$ _____

Spring 2015 Pew Fund Capacity Building Project Budget

Please submit your Project Budget using this form. [Click here to download this form online.](#)

1. Organization Name:

2. Total Organizational Operating Budget for Current Fiscal Year-----

3. Staff Size (FTE)-----

4. Name, phone, and email of person to contact with questions about the budget:

5. Capacity Building Project Budget:

(Please do not include revenues and expenses for the entire organization, but only for the capacity building project)

	Revenues for the Capacity Building Project
REVENUES:	
Equal Measure/Pew	
Other foundations (specify)	
Public agencies (specify)	
Your organization's contribution:	
TOTAL	

	Total Project Expenses	Total Expenses Allocated to EqM Pew Award
EXPENSES:		
Salaries		
Employee benefits		
Other labor costs		
Consultants		
Conferences/meetings		
Travel		
Communications		
Supplies		
Legal		
Rent and utilities		
Equipment cost		
Indirect		
Other: _____		
TOTAL		

Sample Budget Narrative

BUDGET NARRATIVE

Expenses

Salaries

Staff	Annual Salary	% Time Devoted to Project	8/09-7/10
Executive director	\$80,000	2.5%	\$ 2,000
Data Manager	\$60,000	5%	\$ 3,000
			Total: \$ 5,000

Employee benefits

Based on 25% of total salaries \$1,250

Consultants

\$21,750

Consultant to conduct up to 10, 3-hour site visits which will include an assessment of the organizations current client tracking system, the installation of new client database, the training of key staff, and troubleshooting (30 hours total @ \$725/hr)

Travel

Database development meetings (consultant makes 6 trips @ \$250/trip) \$1,500

Equipment purchases

\$15,000

New computer for data manager and TrakRight Software licenses for 5 program staff.

**Pew Capacity Building Program: Fall 2015
Proposal Assessment Plan and Outcomes Table**

Please answer the following questions to describe the project's expected impact on your organization, and your plans for assessing its impact on the organization's performance and its clients. The Outcomes Table at the end of this document should summarize key capacity building activities, short-term and intermediate outcomes, indicators of those outcomes, and methods of data collection for the assessment. [Visit our website for more information on the Capacity Building program.](#) For examples of outputs and outcomes, [click here.](#)

A. How will this project improve the *efficiency* or *effectiveness* of your organization?

B. How will this project improve the *sustainability* or *adaptability* of your organization?

C. How will this project improve your organization's ability to *serve clients*, *expand service*, or *improve the quality of services*?

D. Please describe your plan to assess your proposed project, including a timeline and the staff responsible for carrying out the assessment. Use the following outcomes table to outline the project's outputs, short-term outcomes, and expected intermediate outcomes.

Please identify the outputs, short-term outcomes, and expected intermediate outcomes for your project. If your project has multiple phases, please identify the outputs for each phase. For examples, please [click here for sample outputs and outcomes](#).

Capacity Building Project:		
Project Outputs	Indicator(s)	Data source
Short-term Outcomes	Indicator(s)	Data source
Expected Intermediate Outcomes (2+ years)	Indicator(s)	Data source