



PROGRAM DESCRIPTION
INSTRUCTIONAL GUIDE

United Way Program Description Instructional Guide

Recommended Use of This Guide:

Before writing each section of the program description (e.g. cover page, outcome objective, methodology), read that section of the Instructional Information packet.

You will find:

- A description of the section elements and the purpose of the section

- Key concepts needed to understand that section

- Examples

- Planning questions to consider when formulating your response

After writing the Program Description, use the Program Description checklist at the end of this packet. Check each element of your Program Description against the items on the checklist to make sure that you have covered all elements.

Contents of Program Description Instructional Guide

Program Description Format.....3

Instructional Section

 Program Description Instructions5

 Target Population7

 Community Impact.....7

 Role and Importance of United Way Funding7

 Budget Instructions8

 Common Errors in Selecting Goals and Objectives.....10

Sample Program Description.....11

The following is the **required** format for the program description. The completed program description should be within the **four-page limit** (not including the cover page) and be signed and dated by the chief volunteer officer and the chief professional officer. **Please copy and paste pages 3 & 4 into a new document and use that to create your proposal.** follow this format when you create your submission.

United Way Program Description

Program Name: _____

Provider Name: _____

Program Site(s): _____

Contact Person: _____

Telephone: _____ Email: _____

Requested UW Allocation: \$_____

Total Proposed Program Budget: \$_____

Program Budget as % of Total Agency Budget: ____%

Impact Area: Indicate the Impact Area in which you believe the program best aligns. Please select only one - **Definitions are included on page 6 of this manual.**

Success by 6

Kids On Track

Strengthening Families

Overcoming Disabilities

Helping Seniors

Brief Summary of Program: (50 words or less)

Program Name: _____ Provider Name: _____

TARGET POPULATION

COMMUNITY IMPACT

ROLE AND IMPORTANCE OF UNITED WAY FUNDING

Program Description Instructions

The Program Description represents the performance plan for each program requesting United Way funding. Information gained through the Program Description should provide a very clear and complete picture of the program. Program Descriptions put special emphasis on understanding the impact of each program on its participants: that is, "what difference does this program make?"

The following instructional information defines the elements of the Program Description and gives examples. It will help you understand the type of information requested in the Program Description.

REMINDER: This is just the layout we need. **You MUST submit a separate document in a report format**

Cover Page

Program Name: Program name as you wish it to appear on all United Way documents.

Provider Name: Legal name of organization responsible for the program

Program Sites: Indicate locations of service delivery

Contact Person: Indicate name and title

Telephone: Indicate telephone number and extension

UW Allocation: Amount requested from United Way for the (program) proposed funding year.

Total Program Budget: Amount of funds spent on this program for proposed budget year

Program Budget as % of Total: Percentage that this program budget is of total agency budget

Agency Budget

Impact Area: Please circle the **ONE** impact area with which this program aligns best. Utilize the following definitions:



Success by 6: Focuses upon primary prevention and early intervention programs that help achieve healthy births, prepare kids for school success, and strengthen parenting skills.



Kids on Track: Focuses on prevention and early intervention, but includes some intervention programs all that help school aged children make responsible choices about their lives and future.



Strengthening Families: Focuses on intervention programs that help families gain and maintain self-sufficiency.



Helping Seniors: Focuses on intervention and prevention programs that help seniors address daily challenges and maintain their independence.



Overcoming Disabilities: Focuses on intervention and prevention programs that help each person reach his or her own potential.

Brief Summary of Program

Enter a brief (no more than 50 words) description of the program.

(50 words or less):

This information may be used for multiple types of internal and external communication about your program so be clear and avoid technical jargon whenever possible.

This is the last item on the Cover Page.

All other information in the Program Description must fit on four pages or less, using Calibri 11pt font.

Target Population

Programs provide United Way with an annual profile of participants served through the United Way Beneficiary Report. Programs should not recap in this section the demographic information already provided in the Beneficiary Report. This section gives programs an opportunity to describe the target population served by their program, beyond the demographic statistics. For community development or community education programs serving an entire community (e.g. the 14609 zip code), describe in this section the community you are seeking to impact.

Community Impact

Describe how this program is impacting the community, taking into account the scope of the community need, target population, number of people served, number of people directly impacted, and the cost.

Role/Importance of United Way Funding

Describe the significance of United Way Funding in the success of this program. This should be stated in the context of the entire funding package with support from all sources for this program. If there are leveraged dollars in the funding package, please describe in terms of the type and extent of leveraging.

**United Way of Orleans County
Funding Application
Budget Instructions**

I. Overview. Whereas the program description tool describes the outcomes that a particular program is striving to attain, the corresponding budget details the costs associated with the program effort. Both of these documents provide valuable information that is used by volunteers charged, as stewards of community investments, with making decisions about funding programs that get results for our community.

II. Submission Requirements. The budget package that is submitted to United Way must include one completed budget (**pages 1, 2 and 3**) for each program for which you are asking for funding.

III. Significant Budget Changes. If there have been notable changes in your program or provider budget, for example, the addition or discontinuation of programs, or the loss or gain of a significant funding source, you should include a narrative description of the changes and relevant circumstances in your cover letter.

IV. Preparing for the Budget. In order to complete the United Way budget you will need:

1. adequate copies of each budget page (1, 2 and 3) for each program for which you are requesting funding; this includes either paper copies or copies of computer files
2. the chart of accounts which will explain the types of revenues and expenses that belong within the different categories
3. your internal program budget with details on government and foundation grants, United Way investments and staff salaries

V. Completing the Budget.

Page One: consists of (1) general information and (2) historical financial information.

(1) General Information: fill in the requested information for each of the lines.

The provider name, program name, address, program contact, phone, fax and email are provided each year so that we have up-to-date information, not only to contact you with questions, but to publish in our campaign materials. If you do not have a fax, email or website, please write NA in the blank provided for those categories.

General information also includes the names of the Executive Director and the Board President which are important for transmitting official information, like grant award letters. Please print this information.

The Program Goal should briefly (within the space provided) tell what the program for which you are applying for funding does. This information is also provided on the program description narrative.

- (2) Historical financial information: record the total income, total expenses and resulting surplus or deficit for your provider as a whole for the years requested. Report on your own fiscal year.

It is expected that you will need to estimate the information for the most recent year. Do not leave this section blank.

Page Two: is the main part of the budget and consists of current year program budget, projected program budget and the difference in these two. It also includes the total provider budget for the proposed year and the program as a percent of the total agency.

Use the chart of accounts to help you understand each of the categories for Support/Revenue and Expenditures.

Use the miscellaneous categories sparingly. A significant portion of revenue or expenses in miscellaneous will be questioned, therefore, if more than 10% of revenue or expenses is in the miscellaneous categories please make sure to explain those numbers in a cover letter giving detail as to what those revenue/expenses are.

Use the calculations properly. If you receive a spreadsheet via Email from United Way you will receive pages containing formulas to calculate columns C and E. Do not alter the formulas. If you are using a hard copy form, the proper calculations are listed at the top of the columns. For example, to get the proper number for column C, subtract the number in column A from column B.

Record only actual monetary transactions. In-kind gifts should be captured in the narrative.

Page Three: provides detail to 4 of the categories reported on page 2: Funding from other United Ways, Foundation Grants, Grants from Government Agencies and Staff Salaries.

Ensure that the details on page 3 add up to the total shown on page 2. Errors will be questioned.

Complete the source, current year budget and proposed year budget for United Way, government grants and foundation grants. Please be clear about the source using full names rather than abbreviations to ensure clarity.

Staff information detail is reported for the proposed year only. You must report:

Staff Title: Include all staff that have salaries charged directly to the program. Examples included: Program Director, Executive Director, Therapist, Social Worker, Administrative Assistant

Annual Salary: Include the proposed annual salary for each staff person % of time on this program: use a percentage and report the

amount of time that each staff person spends on the program. In many cases it will be 100%, or all of the staff person's time on the program. In other cases the percentages will vary.

Salary in budget: Taking the annual salary times the percent of time spent on the program will give you the amount of salary included in the program budget. Be certain that the total matches what you reported on page 2.

For example:

Staff Title	Annual Salary	% Time on this program	Salary in budget(salary X %)
Program Director	\$30,000	50%	\$15,000

If you have several staff who all have the same title and are all 100% to the program you can group them.

Grouping example: If there are three therapists who are full time employees on the program (each working 100% of their time on the program) you can put their information in as follows:

Staff Title	Annual Salary	% Time on this program	Salary in budget(salary X %)
Therapist – 3	\$90,000	100%	\$90,000

You do not have to group entries. You can enter each staff separately. This option is to help programs with large numbers of like titled staff. Use it only if it works for you.

Sample Program Description

Your Request should be sent to United Way in this format. Do not fill in the blanks above, but simply use them to complete your own proposal like the one below.

Program Name: Yes, We Can

Provider Name: Youth Employment, Inc.

Program Site(s): One Opportunity Way, Holley, NY

Contact Person: Diana Rector, Employment Services Coordinator

Telephone: 555-4331 ext. 131

requested UW Allocation: \$50,000

Total Program Budget: \$150,000

Program Budget as % of Total Budget 75%

Impact Area: Indicate the Impact Area in which you believe the program best aligns. Please select only one - Definitions are included in the application package.

Success by 6

Kids on Track

Strengthening Families

Overcoming Disabilities

Helping Seniors

Brief Summary of Program: (50 words or less)

"Yes, We Can" provides intensive job training and placement services to unemployed, low-income Clarendon high school students, with priority given to those from families with long-term welfare-dependency. The program is designed to provide successful part-time employment experiences that will increase motivation for graduation, and success in employment and/or college post-graduation.

TARGET POPULATION

This program is open to any unemployed high school-age youth with family income below the poverty line. However, through targeted recruiting with Clarendon Counselors, the program especially seeks out students from families with patterns of long term (over two years) welfare dependency to try to break the dependency cycle. Potential participants are screened by the Career Educator for income eligibility. At that time, family and participant employment history and attitudes toward work are also assessed. First priority in the program is given to students with no prior work history and/or from families receiving public assistance for over two years.

COMMUNITY IMPACT

A goal included in the Orleans County 2015 – A Community Plan, is to improve the school to work transition for those youth most at risk for not making the transition. Our program is one piece of a network of collaborative programs working toward this end. By working with youth in schools we can keep youth interested in education while providing job skills and income from part-time employment. We can impact 8% of the at-risk youth in the County.

ROLE AND IMPORTANCE OF UNITED WAY FUNDING

This program receives funding from the Clarendon School District (50%), State Education Department (25%), Department of Labor (15%) and United Way (10%). The State Education Department funding is a cash-matching grant with local support provided by United Way. The Clarendon School District's contribution is in the form of in-kind support.

United Way funding supports one of the job developer positions, so that over 30 of the student placements are attributable to this position. The fact that we are one (1) of two (2) such programs in Clarendon, the output of that position has a significant impact on the employment rate of youth.