

UNITED WAY OF METROPOLITAN DALLAS

NONPROFIT ASSISTANCE PROGRAM (NAP)

RFP ORIENTATION



GENERAL INFORMATION

- If you have questions during the orientation, please submit them using the chat function.
- We have a dedicated time near the end to address questions, but we may not be able to address all questions and will follow up after the session as needed
- A copy of the presentation and a compilation of all questions submitted/the responses will be provided on our website after the last orientation on October 17th
- Please have a copy of the RFP available to reference today during the orientation
<https://unitedwaydallas.org/nonprofit-assistance-program/>

AGENDA

- Nonprofit Assistance Program (NAP) Eligibility Requirements, Process & Timeline
- Survey Monkey Apply Grant System
- Review the NAP Application
- Questions and Answers
- Closing

UWMD STAFF INTRODUCTION

Name	Title	Email
Ashley Brundage	Executive Director of Housing Stability & Senior Vice President of Community Impact	abrundage@unitedwaydallas.org
Mark Pollack	Senior Director, Community Impact Grantmaking	mpollack@unitedwaydallas.org
Alicia Crews	Senior Administrative Assistant	acrews@unitedwaydallas.org

NONPROFIT ASSISTANCE PROGRAM ELIGIBILITY REQUIREMENTS



GENERAL ELIGIBILITY REQUIREMENTS

1. The organization must be a 501(c)3 or have a fiscal sponsor that is a 501(c)3
2. The organization must be officially registered with the State of Texas
3. The organization must be physically located and operating in the City of Dallas
4. The organization must be serving residents of the City of Dallas by providing direct-to-client social services to low-to moderate-income individuals
5. The organization must be current on applicable City of Dallas taxes
6. The organization must not primarily or solely provide scholarships
7. The organization must have been in existence as a 501(c)3 prior to March 1, 2018

NONPROFIT ASSISTANCE PROGRAM PROCESS & TIMELINE



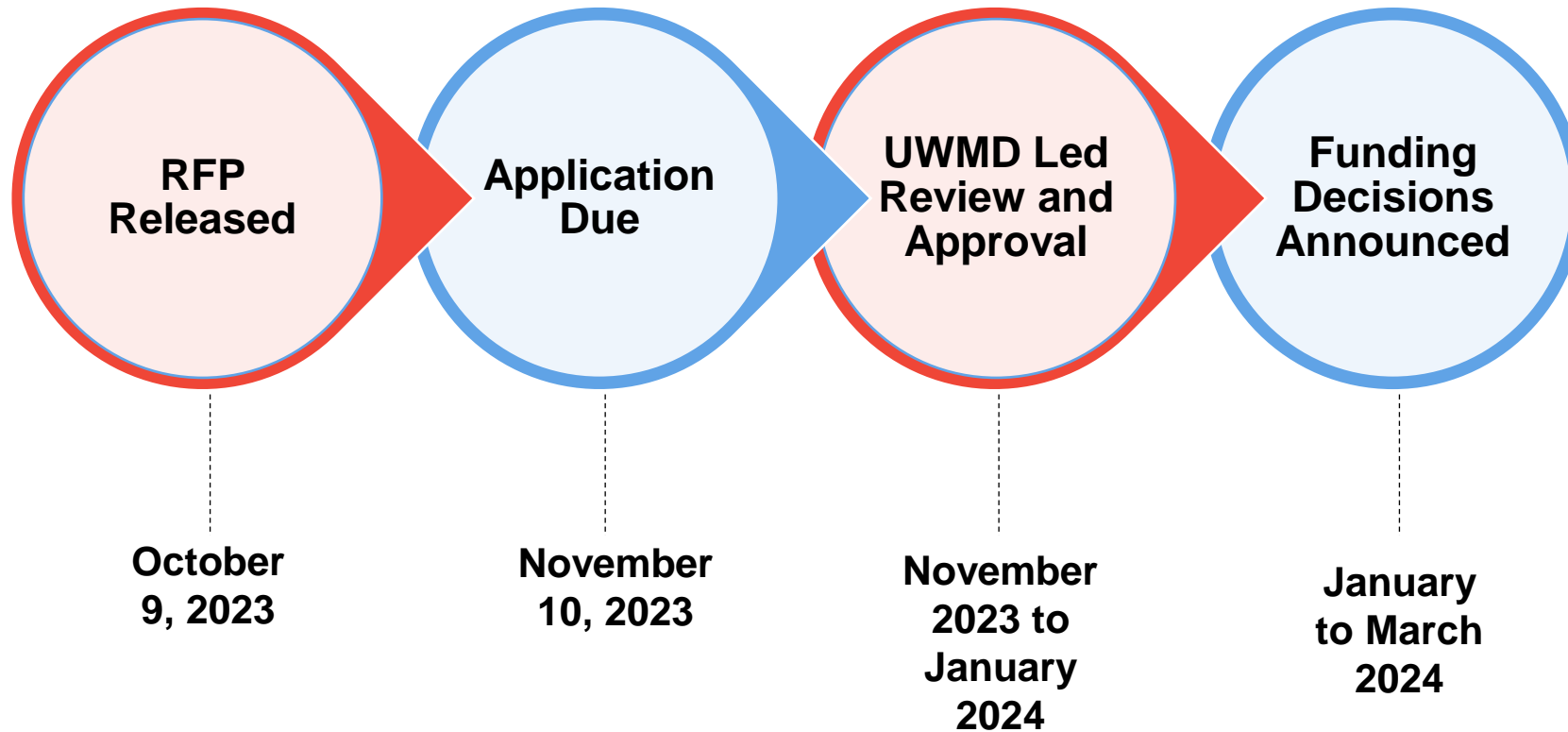
PURPOSE OF NONPROFIT ASSISTANCE PROGRAM GRANT

- The purpose of the Nonprofit Assistance Program is to provide financial support in the form of a grant for operational expenses or demonstrated loss of income to nonprofit organizations.
- Expenses or loss of income must have been incurred or to be incurred between March 3, 2021, and December 31, 2024.
- Expenses can include, but are not limited to expenses such as rent, utilities, staff salaries and benefits, cleaning supplies, and program supplies. The expenses must have resulted from the COVID-19 pandemic and/or in response to needs caused by the pandemic.
- Loss of income must have been incurred since March 3, 2021. Examples include specific loss of revenue associated with an annual fundraising event, reduction of fee-for-services or earned income activity, or loss of specific grant funding tied to reduced or eliminated program activities.

GENERAL GRANT INFORMATION

- The maximum grant award is \$50,000. The maximum grant ask is also \$50,000
- Each organization can submit **1 application**. Each application has space to include up to 10 separate expenses or losses of income.
- An annual report will be due 1 Year after the grant is awarded. The online system for applying will also be used for reporting

APPLICATION TIMELINE



APPLICATION QUESTIONS

If you have questions about the Nonprofit Assistance Program, please contact

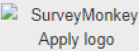
Mark Pollack
mpollack@unitedwaydallas.org

SURVEY MONKEY APPLY GRANT SYSTEM



SURVEY MONKEY APPLY – CREATING AN ACCOUNT

Already have a SurveyMonkey Apply account? [LOG IN](#)


Register for an applicant account

Register with

[f](#) [t](#) [G](#)

OR

☒ Register as an individual
☐ Register as an organization


First name Last name

Email

Password

Confirm password

By registering for an account, you agree to our [terms of service](#) and [privacy policy](#).

☐ I'm not a robot 


[Privacy](#) [Terms](#)

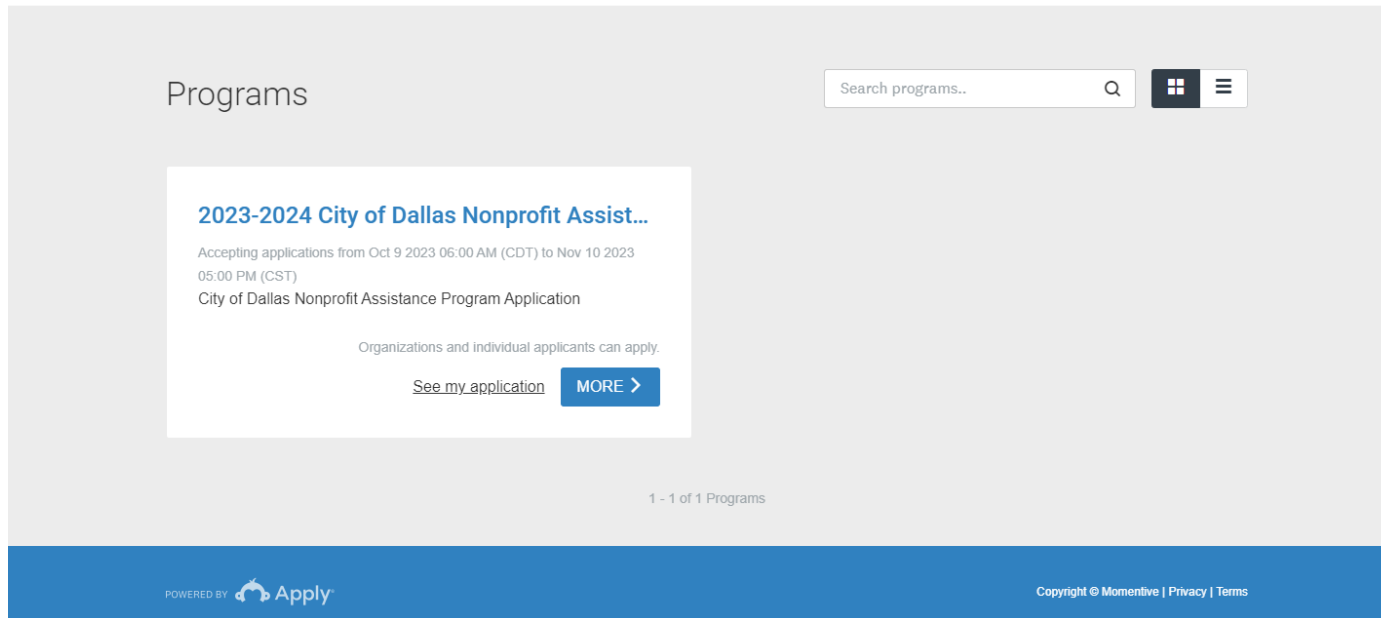
[CREATE ACCOUNT](#)

- If you already have an account, you can select Log In at the top right
- Or you can create a new account
- When creating a new account, you should receive the message almost immediately and should check junk mail if needed
- Account creation requires a confirmation via email

SURVEY MONKEY APPLY – STARTING THE APPLICATION

United Way of Metropolitan Dallas

 Programs  My Applications  Mark Pollack ▾



- Use the “Programs” Page to first access and create the application
- **Once application is created use the “My Applications” to see your active Nonprofit Assistance Program application**

SURVEY MONKEY APPLY – MULTIPLE USER ACCESS

0 of 7 required tasks complete

Last edited: Oct 6 2023 10:04 AM (CDT)

REVIEW **SUBMIT**

Deadline: Nov 10 2023 05:00 PM (CST)

MP Mark Pollack (Owner)
MPollack@unitedwaydallas.org

Add collaborator

- The Survey Monkey Apply grant system allows for multiple individuals to have read or read/write access to an active application.
- The account owner will create an application and can then invite other individuals as needed
- Once an application is created, you'll see the option to add a collaborator to the application
- Click Add collaborator, enter their email addresses, select the access they will have and select "SEND INVITE"
- Recipients should receive the message almost immediately and should check junk mail if needed

SURVEY MONKEY APPLY – BASIC APPLICATION

0 of 7 required tasks complete

Last edited: Oct 6 2023 10:04 AM (CDT)

REVIEW


SUBMIT

Deadline: Nov 10 2023 05:00 PM (CST)

MP

Mark Pollack (Owner)
MPollack@unitedwaydallas.org


Add collaborator

2023-2024 City of Dallas Nonpr... 


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APPLICATION


ACTIVITY


 The current application stage will open on Oct 9 2023 06:00 AM (CDT)

Your tasks





Nonprofit Assistance Program Application Form* (Required)
Cannot be modified







Board of Directors Roster* (Required)
Cannot be modified







Minutes of the Most Recent Board of Directors Meeting* (Required)
Cannot be modified







IRS Determination Letter* (Required)
Cannot be modified







Copy of Articles of Incorporation, By-Laws* (Required)
Cannot be modified






Organization Chart* (Required)
Cannot be modified





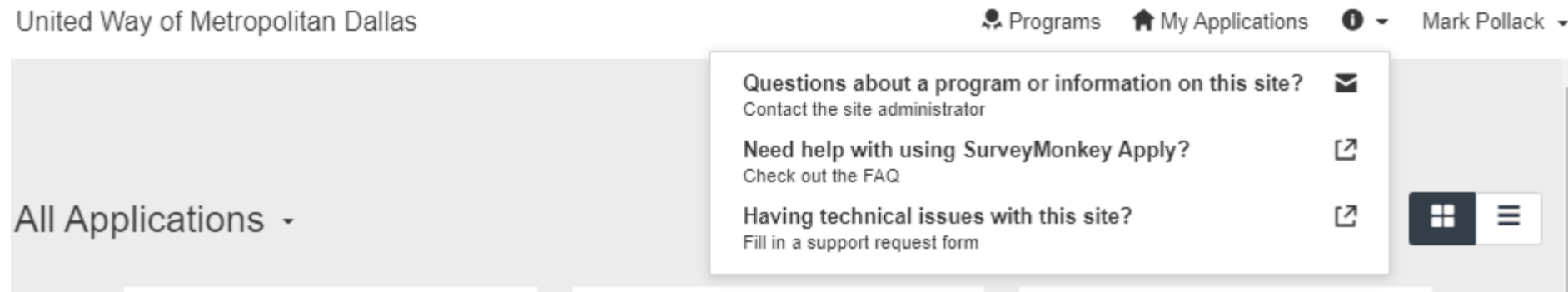
Current Year Organization Operating Budget and Year to Date Financials*



- Each task at the right is part of the application. As they are completed check marks will appear in the circle
- Once all required sections are “Marked as Complete” the “Review” and “Submit” buttons at top left become active
- **Clicking “Submit” will submit the full application**

SURVEY MONKEY APPLY – HELP DESK

- Help Desk is available from Survey Monkey Apply when logged in to an existing account or when creating an account:



SURVEY MONKEY APPLY – TIPS

- Primary account “owner” has to be the person to actually submit the application
 - Especially important if you have a team working on the application
- To skip to different portions of the application click on the tasks listed on the application home screen
- To download the entire application, select the three dots at the top right and select the “Download” option
- Mark each section as complete and then hit the submit button.
- Look for email confirming that the application was actually submitted
- Submitting an application 30 minutes before the deadline is a risky idea

REVIEW THE NAP APPLICATION



RFP QUESTIONS

Section 1: Questions on Page 1 of the application system are for eligibility verification

Section 2: Questions on Page 2 of the application system ask for contact information, program description, and description of geographic service area

Section 3: Questions on Page 3 of the application system are where expenses or loss of income entries are described and supporting documentation is uploaded.

***Page 11 of the RFP**

RFP QUESTIONS – SECTION 1

Basic Organization Information

- Name, DBA (if applicable), Phone Number, EIN

Eligibility Verification

- Date of Organization Founding
- Organization's Physical Address and Selection of City of Dallas Council District
- Types of Services Provided
- Primarily or Solely Provide Scholarships
- Current on Applicable City of Dallas Taxes

**BEFORE PROGRESSING FURTHER IN THE APPLICATION
PLEASE REVIEW YOUR RESPONSES AND CONFIRM WHETHER
OR NOT YOUR ORGANIZATION IS ELIGIBLE FOR THE
NONPROFIT ASSISTANCE PROGRAM.**

**APPLICATIONS SUBMITTED BY ORGANIZATIONS NOT ELIGIBLE
FOR FUNDING WILL NOT BE REVIEWED AND WILL NOT BE
ELIGIBLE FOR GRANT AWARDS.**

RFP QUESTIONS – SECTION 2

Additional Organization Details

Contact Information

- CEO/Executive Director
- Primary Contact
 - Responsible for handling communication specific to application.
 - Can be the same as the CEO/Executive Director contact

RFP QUESTIONS – SECTION 2

Program Services

- Organization mission
- Program Description
 - Describe the primary services and programming delivered to your clients
- Geographic Service Area
 - Describe the geographical area where you provide services (city, school district, neighborhood, zip codes, etc.)

RFP QUESTIONS – SECTION 2

Zip Codes

- Enter up to five zip codes in descending order with the zip code where the highest number of clients receiving services described in the application reside listed first.
- Can enter less than 5 zip codes if services are geographically concentrated
- If you do not track client residence zip code or that information is unavailable, then leave them blank and select the unknown option

RFP QUESTIONS – SECTION 3

Request Amount

- In this section, enter expenses and/or loss of income resulting from the COVID-19 pandemic or in response to needs caused by the pandemic.
- Each applicant will be able to include up to 10 separate expenses or losses of income that, when combined, should not add up to more than the maximum request amount.
 - It is possible to combine like expenses if needed. For example, if PPE was purchased multiple times in the time frame associated with this program, the documentation could be combined into a single PPE expense.
- The maximum request amount and award amount is \$50,000 per organization.

RFP QUESTIONS – SECTION 3

Expenses

- Any expenses must have been or will be incurred between March 3, 2021, and December 31, 2024.
- Expenses are for operational expenses including, but not limited to, expenses such as rent, utilities, staff salaries and benefits, cleaning supplies, and program supplies resulting from COVID-19 and/or in response to needs caused by the pandemic.
- If expenses are a projection that will occur between the deadline of this application (November 10, 2023) and December 31, 2024, they must be projections of costs that are regular and consistent operations expenses (such as a lease payment for a facility).
- Expenses must be substantiated by both a document that states the expense (such as an invoice or ledger entry) and evidence that the invoice or expense was actually paid by the organization (or has ongoing payments for projected expenses).

RFP QUESTIONS – SECTION 3

Loss of Income:

- Any loss of income must have been incurred since March 3, 2021
- Examples of loss of income include:
 - Loss of revenue associated with an annual fundraising event
 - Reduction of fee-for-services or earned income activity
 - Loss of specific grant funding tied to reduced or eliminated program activities
- For loss of income related to fundraising events, two years of history for this event or one very similar must be provided to substantiate the typical results of the fundraising event that occurred prior to March 3, 2021.
- This information should be provided in a memo with an explanation including the fundraising comparisons.

RFP QUESTIONS – SECTION 3

Expenses/Loss of Income

- Each entry requires a description of the expense or loss of income
- Each entry requires a description of how the expense or loss of income is resulting from COVID-19 or in response to needs caused by the pandemic
- Enter the dollar value of the entry
- Enter the date of the entry
- Each entry requires supporting documentation and there is a space for each entry to allow that to be uploaded. Uploads can be done in a variety of formats

UPLOADED DOCUMENTS



UPLOADED DOCUMENTS

REQUIRED:

- Board of Directors Roster
- Minutes of the Most Recent Board of Directors Meeting
- IRS Determination Letter
- Copy of Articles of Incorporation, By-Laws
- Organization Chart
- Unaudited Financial Statements

OPTIONAL (IF AVAILABLE):

- Independent Audit

UPLOADED DOCUMENT – BOARD OF DIRECTORS ROSTER

- Current roster of Board of Directors
- Include the following information:
 - Name
 - Company Relationship (if applicable)
 - Officer Role (if applicable)
 - Board Tenure
 - Gender
 - Race/Ethnicity
 - Professional Field/Occupation
- Format of the document can vary

UPLOADED DOCUMENTS – BOARD MEETING MINUTES

- Upload the minutes from your organization's most recent Board of Directors meeting.
- Format of the document can vary

UPLOADED DOCUMENTS – IRS DETERMINATION LETTER

- Upload the organization's most recent IRS determination letter. The IRS determination letter must document proof of the organization's existence on or before March 1, 2018
- Format of the document can vary

UPLOADED DOCUMENTS – ARTICLES OF INCORPORATION, BY-LAWS

- Upload a copy of the organization's Articles of Incorporation and By-Laws
- Format of the document can vary

UPLOADED DOCUMENTS – ORG. CHART

- Upload your organization's Org. Chart. The chart only needs to list position titles (no names required)
- Format of the document can vary

UPLOADED DOCUMENTS – CURRENT YEAR ORGANIZATION OPERATION BUDGET AND YEAR-TO-DATE FINANCIALS

- Upload the most current board-approved operating budget
- Upload or include the year-to-date financials
 - Includes a Statement of Financial Position (Balance Sheet)
 - Includes a Statement of Activities (Financial Stability Statement)

OPTIONAL UPLOADED DOCUMENT – INDEPENDENT AUDIT *(IF AVAILABLE)*

This is not required to apply or be awarded a grant

- If the organization has an independent audit, upload the most current version
- Format of the document can vary

QUESTIONS AND ANSWERS



QUESTIONS & ANSWERS

- Please submit questions using the chat feature of the Zoom meeting
- We will do our best to answer questions of general interest during this session
- Some questions may require individual follow up from staff
- If you have agency specific type questions, please reach out separately to our staff team
- We will track the questions and responses from each session and provide a document that provides a response to the questions from each session so all applicants can see the same responses. It will be found online at <https://unitedwaydallas.org/nonprofit-assistance-program/>

CLOSING



NEXT STEPS

- Create an account in or login to an existing account in Survey Monkey Apply to start the application
- Visit <https://unitedwaydallas.org/nonprofit-assistance-program/> for copies of the RFP, orientation presentation*, and questions from orientation sessions*
- **Applications are due online by 5:00 pm on Friday, November 10th**

**These documents will be provided after last orientation session on October 17th*

THANK YOU

