



United Way of the
Greater Dayton Area

2017-2018 Letter of Intent Andar Navigation Manual

Core Safety Net, General, Homeless, and Frail Elderly Services	Timeline
Andar Log in emailed	January 27, 2017
Online Submission of Questions with Answers posted online	January 24 - February 17, 2017
Final Posting of Answers	February 22, 2017
Letter of Intent Due	March 3, 2017
Notification of approval for Full Application Submission is sent to Organizations	No later than March 31, 2107

**Letter of Intent questions: hspd@mcoho.org
Andar/Technical Support Requests: jointrfpinfo@dayton-unityedway.org**

Welcome to the 2017-2018 Combined Funding Process Part 1: Letter of Intent

Log In

- Open the email you received from jointrfpinfo@dayton-unitedway.org.
- Please read the entire log in email.
- At the bottom of the email Click on the word ONLINE LOG IN (it is blue and underlined)
- Save this email where you will find it easily or mark as “keep as new”. You will this email to log in to Andar.
- You may also bookmark the Andar page when you log in so you can continue to gain access to Andar easily. Some computer will ask you for your log in and password if you save this log in to your bookmark.

If you are unable to access Andar or if the Andar system asks you to enter a log in and password please go back to your original log in email and try again.

If you are still unable log in please send an email to jointrfpinfo@dayton-unitedway.org

Letter of Intent Package Screen

When you log into Andar from your Log in Email you will see 3 Letter of Intent (LETTER OF INTENT) Package types on the Package Screen. Each Letter of Intent type has it’s own Package.

- Letter of Intent: Core Safety Net Services
- Letter of Intent: Frail Elderly Supported Services
- Letter of Intent: General Supported Services

Packages

Due Date		Description	Status
Mar 4, 2017	 	Letter of Intent: Core Services	Outstanding
Mar 4, 2017	 	Letter of Intent: Frail Elderly Supported Services	Outstanding
Mar 4, 2017	 	Letter of Intent: General Supported Services	Outstanding

If you click on *Combined Funding Application Phase 1: LETTER OF INTENT* on the the Main Menu this will also take you to this package screen.



PLEASE NOTE THE DUE DATE ON THE PACKAGE SCREEN IS NOT CORRECT. The due date for the Letter of Intent Process is March 3, 2017 at 5:00 pm. The Andar System will be turned off at this time. The package screen reads March 4 because Andar runs on a 24 hour clock. Applicants will have access to the system until 5:00 pm on March 3rd. (The system would shut off at 12:01am on March 3, 2017 if we listed March 3rd as due date)

Important Things to Remember

- To submit more than one Letter of Intent of the same type you must use the  Add a form button in front of the form name to access additional forms.
- **BE SURE TO TYPE IN ALL DATA AND NOT USE THE AUTO COMPLETE FIELDS YOUR COMPUTER OFFERS YOU.** If you do use the auto complete field answers you run the risk of multiple forms having the same answers. This can start to become confusing.
- There is no limit on the number Letter of Intent packages an Agency can submit.
- There is no limit on the number of forms you can add to accommodate submitting multiple packages of the same Letter of Intent type.
- There is no constraint on completing multiple types of LETTER OF INTENT packages. (IE: One agency may choose to submit 1 LOI Frail Elderly and 2 LOI General Supported Services.)
- Always use the  Return button at the bottom of every screen to return to the prior screen. Depending on how your online system has been set up, you may or may not be able to use the back arrow to return to a prior screen, while you are logged in to the Andar System. If you get an error message while using the back button, please click the refresh button at the top of your screen, to the left of your address bar . If you are still unable to get back into the Andar System please close all screen and return to your log in email to log back in.
- Please remember to click  Save at the bottom of your forms. With inactivity your system may time out (this is a setting on your individual computer, please see your Information Technology Staff to adjust your computers settings if your online forms are timing out too quickly)
- If you copy and paste responses from word/excel into the online forms please review the PDF document of the completed form **PRIOR TO SUBMITTING** the form. Many times an online database system will not read all characters equally. For instance, in Internet Explorer a? is often read as a . Please review each form in a PDF format to ensure the characters are all correct and any character or spelling errors are fixed prior to submission. You can print a PDF of any form or of the whole package by clicking the  printer button.
- Click  Submit when you are completely done with a form and the form has been approved by your Agency/Program leadership. ***Once you click submit you cannot make any changes to the responses in that form.*** If you accidentally hit Submit please send a request to jointrfpinfo@dayton-unitedway.org to have form unlocked.
- **IF A PACKAGE HAS MULTIPLE FORMS OF THE SAME TYPE THE PACKAGE WILL ALWAYS READ OUTSTANDING.**

Letter of Intent – Core Safety Net Services

Click on the link in the Log In email you received from jointrfpinfo@dayton-unitedway.org

When Andar opens you will see your name at the top of the Package Screen on the right.

- Click on the Letter of Intent: Core Services Package



Welcome Melonya

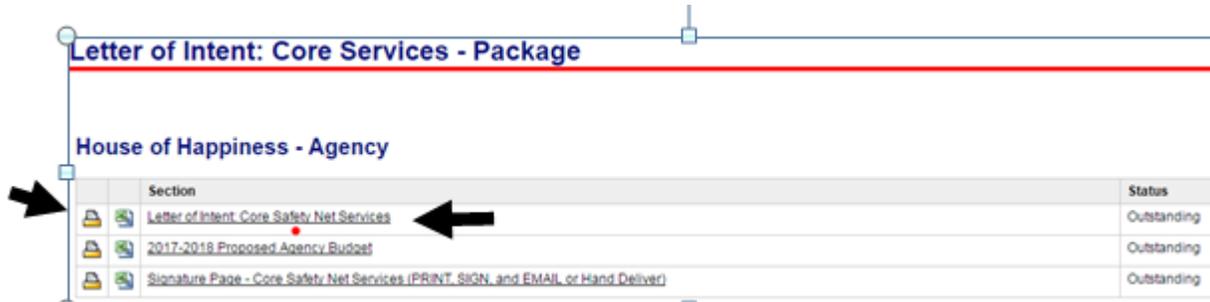
Main Menu

- ▶ Combined Funding Application Phase 1: LOI
- ▶ My Output(s)
- ▶ Logout

Packages

Due Date	Description	Status
Mar 4, 2017	Letter of Intent: Core Services	Outstanding
Mar 4, 2017	Letter of Intent: Frail Elderly Supported Services	Outstanding
Mar 4, 2017	Letter of Intent: General Supported Services	Outstanding

Now you are in the Letter of Intent: Core Services Package.



Letter of Intent: Core Services - Package

House of Happiness - Agency

Section	Status
Letter of Intent: Core Safety Net Services	Outstanding
2017-2018 Proposed Agency Budget	Outstanding
Signature Page - Core Safety Net Services (PRINT, SIGN, and EMAIL or Hand Deliver)	Outstanding

Click on form 1: [Letter of Intent Core Safety Net Services](#)

- Answer all questions about your agency, program, and funding requests.

Program Name: *

AGENCY INFORMATION

Name of Organization *

Main Address *

Fax Number *

Executive Director Name *

Executive Director Phone Number *

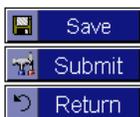
Executive Director Email Address *

Agency Primary Contact Person Name (if other than Executive Director)

Agency Primary Contact Phone Number

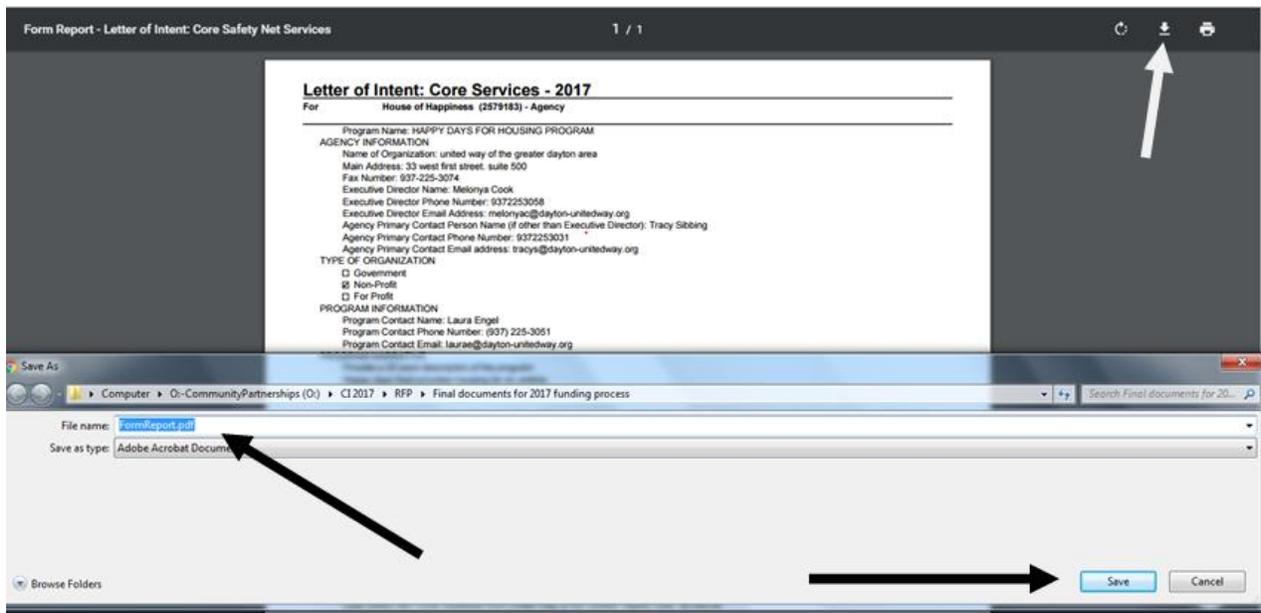
Agency Primary Contact Email address

- Save your responses often by clicking on the save button at the bottom of the form.



Continued: Letter of Intent – Core Safety Net Services

- To make changes to any form click the  update form button. **You must have saved your responses into the form by clicking the save button before clicking the update form button to see the changes you made to the form you were most recently working in.**
- When all responses are entered and reviewed save one more time.
- Click the  printer button beside the form name.
- Click on the download button when a new screen appears. This button is an arrow with a line under it.  line under it.
- Save the PDF on your computer, in a folder you can find easily. Be sure to give your file a correct file name. I would suggest following this example: Agency name. LOI Core services. Date (house of happiness LOI core services 1.31.17)



- Review all responses on this pdf document. Make sure your Agency/program leadership has approved all the responses.
- Make any updates needed to the responses by logging back into the online forms and click the update form button beside the form you want to update. Continue to print and review each Letter of Intent Core Services form until you are sure you do not need to make any more changes.
- Click  Submit when you are sure all responses have been approved by your Agency/Program leadership. ***Once you click submit you cannot make any changes to your responses in that form.*** If you accidentally hit Submit please send a request to jointrfpinfo@dayton-unitedway.org to unlock the form.

How do I submit Multiple Letter(s) of Intent for Core Services?

- Click on the Letter of Intent: Core Services Package

NOTICE: The first Letter of Intent form you completed is now the name of the program you entered on the original form. See below – the form name is no longer Letter of Intent Core Services – it is the name of the program I entered as my Program Name response. On the top of the form you will notice it continues display the original form name.

- Click the  Add a Form button beside the first form you completed.

Letter of Intent: Core Services



Form				
				HAPPY DAYS FOR HOUSING PROGRAM

- This will add an empty Letter of Intent form to the package.
- Complete this form just as you did the first form.
- Save your responses often by clicking on the save button at the bottom of the form.



- Each Letter of Intent form you add will display the Program name as the form name once you have clicked Save and clicked the update form button.
- To make changes to any form, click the  update form button in front of the form name for which you want to make changes/add responses. You must have saved your responses into the form by clicking the save button and **the update form button to see changes.** If you have multiple versions of the same form **YOU MUST CLICK THE PENCIL – UPDATE FORM button after clicking save.** Just clicking the save button will NOT show you the newly entered responses even when they are saved in the system.
- Click the  Add Form button beside the first form in the package until you have completed a form for each program for which you intend to request funds.
- Enter responses for each form question just as you did in the first form.
- Save your responses often by clicking on the save button at the bottom of the form.
- When you finished entering all of your responses click the  button beside the form name.
- Follow the instructions for downloading under the Letter of Intent Form page of this manual. When you are sure you do not need to make any more changes to this form click the submit button at the bottom of the form like you did in the first form.
- Click  Submit when you are sure all responses have been approved by your Agency/Program leadership. **Once you click submit you cannot make any changes to your responses in that form.** If you accidentally hit Submit please send a request to jointrfpinfo@dayton-unitedway.org to unlock the form.

To delete a Letter of Intent form change the first question response to DELETE and send an email to jointrfpinfo@dayton-unitedway.org and request for a form to be deleted. Include your phone number in the email. Deletions will only be made while a user is on the phone.

Agency Budget

Click on Form 2: [2017-2018 Proposed Agency Budget](#)

House of Happiness - Agency

Section	Status
 Letter of Intent Core Safety Net Services	Outstanding
 2017-2018 Proposed Agency Budget 	Outstanding
 Signature Page - Core Safety Net Services (PRINT, SIGN, and EMAIL or Hand Deliver)	Outstanding

 Return

Users may want to click the excel button beside the Agency Budget form to see all the budget line items and enter dollar amounts in this excel document prior to entering responses into Andar. This will allow you to be sure your calculations are correct – and provide the person(s) preparing the Agency Budget to see all line items available in the form.

- Enter all dollar amounts in the 2017-2018 Proposed Agency Budget form.

Item	Description	Amount	Side
1	Total Supported Services Revenue	\$1,500.00	Income
1.5	Total Frail Elderly Revenue	\$1,200.00	Income
2	Total United Way Revenue (including designations)	\$15.00	Income
3	All Government	\$16.00	Income

- Notice the Andar System will calculate the total revenue and expense.
- You will find the totals and any surplus/deficit of the Agency Budget at the bottom of the form.

Total Income	\$275,000.00
Total Expense	\$275,000.00
Total Surplus/Deficit	\$0.00

- When you have entered and saved all responses in the budget form, please click the  button beside the form name.
- Click on the download button when a new screen appears. This button is an arrow with a  line under it.
- Save the budget PDF on your computer, in a folder you can find easily. Be sure to give your file a correct file name. I would suggest following this example: Agency name. BUDGET Date (house of happiness BUDGET 1.31.17)
- Review all responses on this pdf document. Make sure your Agency/program leadership has approved all the responses.
- Make any updates needed to the responses by logging back into the online forms and clicking on the budget name Continue to print and review the budget form until you are sure you do not need to make any more changes.
- Click  when you are sure all responses have been approved by your Agency/Program leadership. **Once you click submit you cannot make any changes to your responses in that form.** If you accidentally hit Submit please send a request to jointrfpinfo@dayton-unitedway.org to unlock the form.

Required Organizational Documents

- Please submit all Organizational Documents by email to jointrfpinfo@dayton-unitedway.org

Please use this check list to ensure you have submitted every document required.

	<p>Audit - Most recent audited Financial Statements. Service Providers are expected to obtain an audit of their Financial Statements within six months of the end of their fiscal year. The audit is expected to be done within Generally Accepted Accounting Principles. The Audit must have a year-end no older than 12/31/2015. If your agency does not complete an audit, please provide a written explanation.</p>
	<p>Management Letter – If the most recent audit had a management letter (also known as internal control deficiency letter) with it, please submit a copy of that management letter and organization’s formal response. (A management letter is a detailed letter from the auditor that is usually addressed to the board of directors or the audit committee. It presents weaknesses identified during the audit and offers recommendations to address them.</p>
	<p>Tax Return - Most recent IRS Form 990 or 990EZ. The tax return must have a year-end no older than 12/31/2015).</p>
	<p>NOTE: You MUST SUBMIT an IRS Form 990/990EZ unless your organization is a church or other house of worship, and thus not required by the IRS to file a return. This exemption DOES NOT apply to general faith-based nonprofit service organizations.</p>
	<p>Current Budget - Most current Board-approved budget with comparison of previous year and current year-to-date actual revenues and expenditures.</p>
	<p>Board Roster – Most current roster of your Board of Directors indicating those who are officers, members of the Executive Committee, and all standing committees.</p>
	<p>Unaudited Financial Statements – Most recent financial statements, no earlier than December 2016, should include a Statement of Financial Position (Balance Sheet) and Statement of Activities (Income Statement).</p>
	<p>Patriot Act Compliance – If the Service Provider receives United Way funds and donations, in compliance with the USA PATRIOT (Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism) Act and other counterterrorism laws, the United Way requires that each Service Provider certify that United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes, and executive orders.</p>
	<p>Disclosures – Please list any major changes and/or circumstances, fraud, litigation, investigation, or other related occurrences since your most recent audit that would affect the financial health of your organization. If there are not any disclosures, please indicate such when completing the form online.</p>
	<p>IRS Determination Letter - Most recent IRS determination letter. This document is required only if an applicant agency is not currently receiving funding from Montgomery County or United Way.</p>

Signature Page

Each Agency needs one signed Signature Page regardless the number programs for which your Agency is intending to request Core Safety Services funds.

- Click the  button beside the 3rd form: (there are no online responses needed in this form)

Letter of Intent: Core Services - Package

House of Happiness - Agency

	Section	Status
	Letter of Intent - Core Safety Net Services	Outstanding
	2017-2018 Proposed Agency Budget	Outstanding
	Signature Page - Core Safety Net Services (PRINT, SIGN, and EMAIL or Hand Deliver)	Outstanding



- Click on the download button when a new screen appears.



- Save your Signature Page PDF document on your computer in a place you will be able to find it.
- Print the signature page
- Obtain all signatures required. These written responses can be anywhere in the white part of the page. **BE SURE PRINTED NAME AND DATE ARE LEGIALBE.**
 - Print name of the Executive Director/ President / CEO of the Agency
 - Signature of the Executive Director/ President / CEO of the Agency
 - Date of the Signature of the Executive Director/ President / CEO of the Agency
- Scan the signed signature page and email it to jointrfpinfo@dayton-unitedway.org or hand deliver to 33 West First Street, Suite 500, Dayton, Ohio 45402. There will be no receipts given for hand delivered documents.

Print Your Completed Letter of Intent: Core Services Package

- Click on the Main Menu or use your return button to get back to the Package Screen

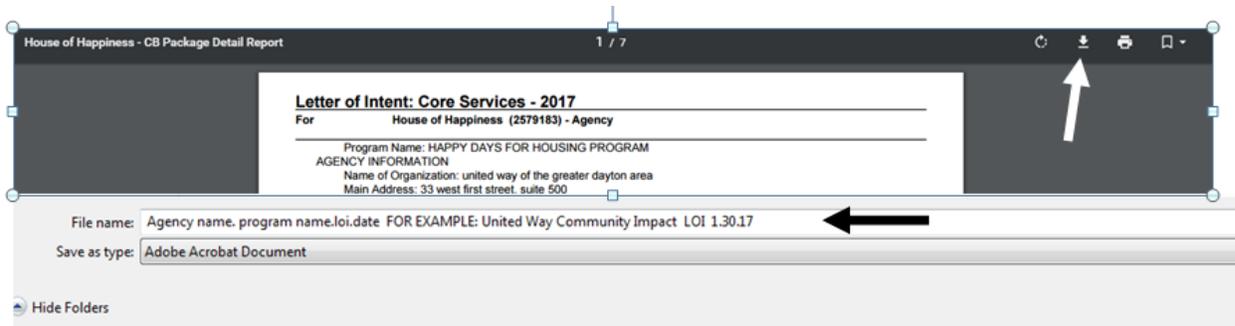
Welcome Melonya



Packages

Due Date	Description	Status
Mar 4, 2017	Letter of Intent: Core Services	Outstanding
Mar 4, 2017	Letter of Intent: Frail Elderly Supported Services	Outstanding
Mar 4, 2017	Letter of Intent: General Supported Services	Outstanding

- Click the Printer Button  beside the Letter of Intent Core Services Package
- Click on the download button when a new screen appears.
- Be sure to give your file a correct file name. I would suggest following the example in the photo below. Agency name complete core services LOI date (house of happiness complete core services loi 1.31.17)
- Save the PDF of the COMPLETE LETTER OF INTENT CORE SAFETY SERVICE PACKAGE in a folder you can find easily on your computer.



- **IF A PACKAGE HAS MULTIPLE FORMS OF THE SAME TYPE THE PACKAGE WILL ALWAYS READ OUTSTANDING.**

Letter of Intent – Frail Elderly Supported Services

- Click on the link in the Log In email you received from jointrfpinfo@dayton-unitedway.org
- You will see your Name at the top of the Package Screen on the right.
- Click on the Letter of Intent: Frail Elderly Supported Services

Welcome Melonya

Main Menu

- ▶ Combined Funding Application Phase 1: LOI
- ▶ My Output(s)
- ▶ Logout

Packages

Due Date	Description	Status
Mar 4, 2017	Letter of Intent: Core Services	Outstanding
Mar 4, 2017	Letter of Intent: Frail Elderly Supported Services	Outstanding
Mar 4, 2017	Letter of Intent: General Supported Services	Outstanding

Now you are in the Letter of Intent: Frail Elderly Supported Services Package

[Letter of Intent: Frail Elderly Supported Services - Package](#)

House of Happiness - Agency

	Section
	Letter of Intent: Frail Elderly Supported Services
	2017-2018 Proposed Agency Budget
	Signature Page - Frail Elderly Supported Services (PRINT, SIGN, and EMAIL or Hand Deliver)

Return

Click on form 1: [Letter of Intent Frail Elderly Supported Services](#)

- Answer all questions about your agency, program, and funding requests.

Program Name *	<input type="text" value="HAPPY DAYS FOR HOUSI"/>
AGENCY INFORMATION	
Name of Organization *	<input type="text" value="united way of the greater d"/>
Main Address *	<input type="text" value="33 west first street, suite 50"/>
Fax Number *	<input type="text" value="937-225-3074"/>
Executive Director Name *	<input type="text" value="Melonya Cook"/>
Executive Director Phone Number *	<input type="text" value="9372253058"/>
Executive Director Email Address *	<input type="text" value="melonyac@dayton-unitedw"/>
Agency Primary Contact Person Name (if other than Executive Director)	<input type="text" value="Tracy Sibbing"/>
Agency Primary Contact Phone Number	<input type="text" value="9372253031"/>
Agency Primary Contact Email address	<input type="text" value="tracys@dayton-unitedway.c"/>

- Save your responses often by clicking on the save button at the bottom of the form.

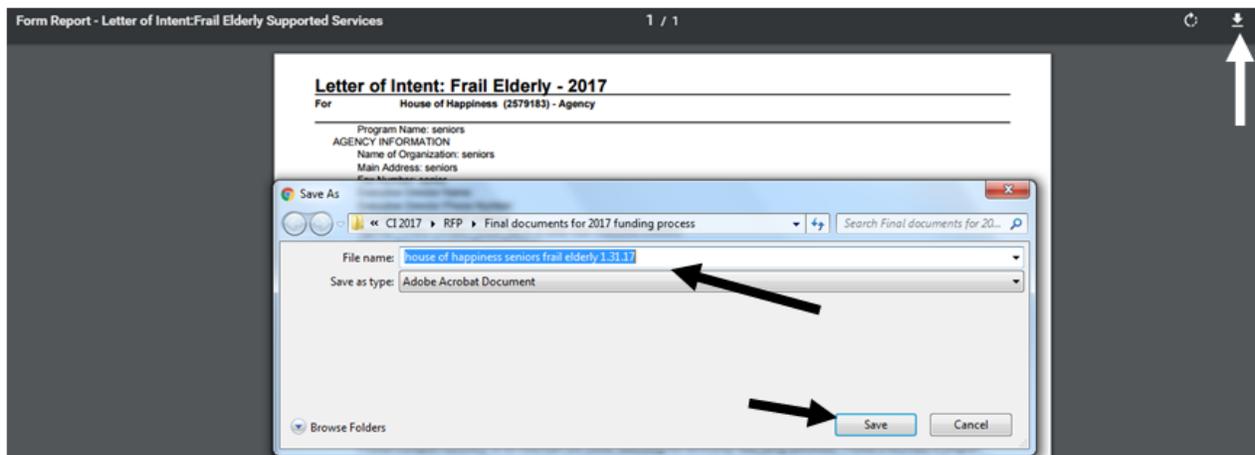
Save

Submit

Return

Continued: Letter of Intent – Frail Elderly

- To make changes to any form click the  update form button. **You must have saved your responses into the form by clicking the save button before clicking the update form button to see the changes you made to the form you were most recently working in.**
- When all responses are entered and reviewed save one more time.
- Click the  printer button beside the form name.
- Click on the download button when a new screen appears. This button is an arrow with a line under it.  line under it.
- Save the PDF on your computer, in a folder you can find easily. Be sure to give your file a correct file name. I would suggest following this example: Agency name. LOI Frail Elderly. Date (house of happiness LOI form Frail Elderly 1.31.17)



- Review all responses on this pdf document. Make sure your Agency/program leadership has approved all the responses.
- Make any updates needed to the responses by logging back into the online forms and click the update form button beside the form you want to update. Continue to print and review each Letter of Intent LOI Frail Elderly form until you are sure you do not need to make any more changes.
- Click  Submit when you are sure all responses have been approved by your Agency/Program leadership. ***Once you click submit you cannot make any changes to your responses in that form.*** If you accidentally hit Submit please send a request to jointrfpinfo@dayton-unitedway.org to unlock the form.

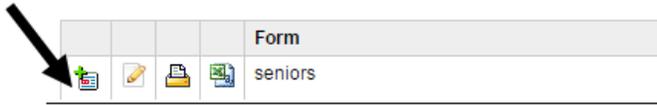
How do I submit Multiple Letter(s) of Intent for Frail Elderly?

- Click on the Letter of Intent: Frail Elderly

NOTICE: The first Letter of Intent form you completed is now the name of the program you entered on the original form. See below – the form name is no longer Letter of Intent Core Services – it is the name of the program I entered as my Program Name response. On the top of the form you will notice it continues display the original form name.

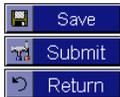
- Click the  Add a Form button beside the first form you completed.

Letter of Intent: Frail Elderly



To delete a Letter of Intent form change the first question response to DELETE and send an email to jointrfpinfo@dayton-unitedway.org and request for a form to be deleted. Include your phone number in the email. Deletions will only be made while a user is on the phone.

- This will add an empty Letter of Intent form to the package. Complete this form just as you did the first form.
- Save your responses often by clicking on the save button at the bottom of the form.



- Each Letter of Intent form you add will display the Program name as the form name once you have clicked Save and clicked the update form button.
- To make changes to any form, click the  update form button in front of the form name for which you want to make changes/add responses. You must have saved your responses into the form by clicking the save button and **the update form button to see changes.** If you have multiple versions of the same form **YOU MUST CLICK THE PENCIL – UPDATE FORM button after clicking save.** Just clicking the save button will NOT show you the newly entered responses even when they are saved in the system.
- Click the  Add Form button beside the first form in the package until you have completed a form for each program for which you intend to request funds.
- Enter responses for each form question just as you did in the first form.
- Save your responses often by clicking on the save button at the bottom of the form. When you finished entering all of your responses click the  button beside the form name.
- Follow the instructions for downloading under the Letter of Intent Form page. When you are sure you do not need to make any more changes to this form click the submit button at the bottom of the form like you did in the first form.
- Click  Submit when you are sure all responses have been approved by your Agency/Program leadership. **Once you click submit you cannot make any changes to your responses in that form.** If you accidentally hit Submit please send a request to jointrfpinfo@dayton-unitedway.org to unlock the form.

Agency Budget

- Click on Form 2 in the Letter of Intent Frail Elderly Supported Services Package: 2017-2018 Proposed Agency Budget

Letter of Intent: Frail Elderly Supported Services - Package

House of Happiness - Agency

Section	
 	Letter of Intent:Frail Elderly Supported Services
 	2017-2018 Proposed Agency Budget ←
 	Signature Page - Frail Elderly Supported Services (PRINT, SIGN, and EMAIL or Hand Deliver)

 Return

Users may want to click the excel button beside the Agency Budget form to see all the budget line items and enter dollar amounts in this excel document prior to entering responses into Andar. This will allow you to be sure your calculations are correct – and provide the person(s) preparing the Agency Budget to see all line items available in the form.

- Enter all dollar amounts in the PROPOSED AGENCY BUDGET.

Item	Description	Amount	Side
1	Total Supported Services Revenue	\$1,500.00	Income
1.5	Total Frail Elderly Revenue	\$1,200.00	Income
2	Total United Way Revenue (including designations)	\$15.00	Income
3	All Government	\$16.00	Income

- Notice the Andar System will calculate the totals of revenue and expense for you.
- You will find the totals and any surplus/deficit of the Agency Budget in the bottom of the form.

Total Income	\$275,000.00
Total Expense	\$275,000.00
Total Surplus/Deficit	\$0.00

- You can print the form in PDF to check all budget form responses.
- You can also open the form in excel and check responses or change responses in excel to ensure the calculations you made are correct.
- Save your responses often by clicking on the save button at the bottom of the form.
- When you finished entering all of your responses click the  button beside the form name.
- Follow the instructions for downloading under the Letter of Intent Form page. When you are sure you do not need to make any more changes to this form click the submit button at the bottom of the budget form.
- Click  Submit when you are sure all responses have been approved by your Agency/Program leadership. **Once you click submit you cannot make any changes to your responses in that form.** If you accidentally hit Submit please send a request to jointrfpinfo@dayton-unitedway.org to unlock the form.

Required Organizational Documents

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Please use this check list to ensure you have submitted every document required.

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	<p>Management Letter – If the most recent audit had a management letter (also known as internal control deficiency letter) with it, please submit a copy of that management letter and organization’s formal response. (A management letter is a detailed letter from the auditor that is usually addressed to the board of directors or the audit committee. It presents weaknesses identified during the audit and offers recommendations to address them.</p>
	<p>Tax Return - Most recent IRS Form 990 or 990EZ. The tax return must have a year-end no older than 12/31/2015).</p>
	<p>NOTE: You MUST SUBMIT an IRS Form 990/990EZ unless your organization is a church or other house of worship, and thus not required by the IRS to file a return. This exemption DOES NOT apply to general faith-based nonprofit service organizations.</p>
	<p>Current Budget - Most current Board-approved budget with comparison of previous year and current year-to-date actual revenues and expenditures.</p>
	<p>Board Roster – Most current roster of your Board of Directors indicating those who are officers, members of the Executive Committee, and all standing committees.</p>
	<p>Unaudited Financial Statements – Most recent financial statements, no earlier than December 2016, should include a Statement of Financial Position (Balance Sheet) and Statement of Activities (Income Statement).</p>
	<p>Patriot Act Compliance – If the Service Provider receives United Way funds and donations, in compliance with the USA PATRIOT (Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism) Act and other counterterrorism laws, the United Way requires that each Service Provider certify that United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes, and executive orders.</p>
	<p>Disclosures – Please list any major changes and/or circumstances, fraud, litigation, investigation, or other related occurrences since your most recent audit that would affect the financial health of your organization. If there are not any disclosures, please indicate such when completing the form online.</p>
	<p>IRS Determination Letter - Most recent IRS determination letter. This document is required only if an applicant agency is not currently receiving funding from Montgomery County or United Way.</p>

Signature Page

Each Agency needs one signed Signature Page regardless of how many programs for which your Agency is intending to request funds.

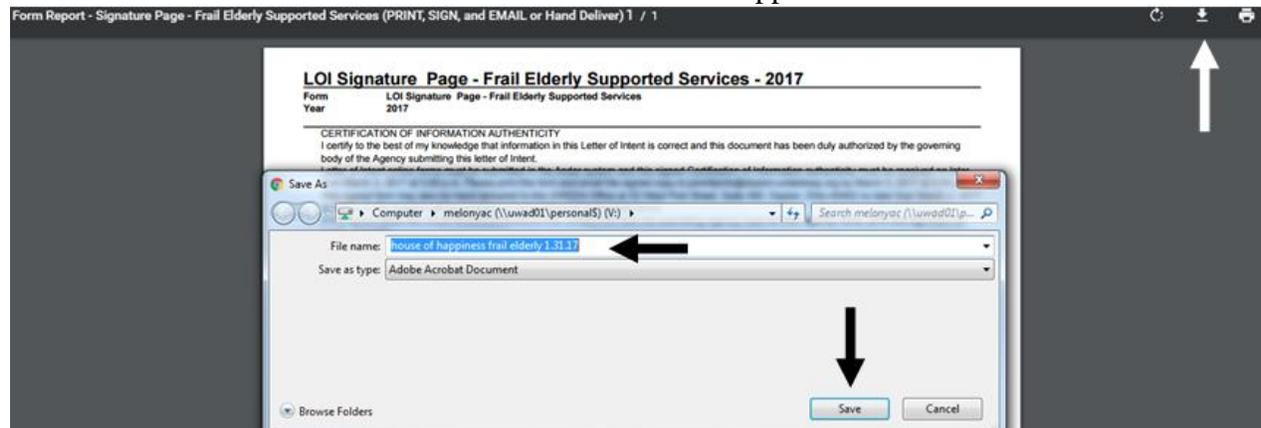
Click the  button beside the 3rd form: (there are no online responses needed in this form)

Letter of Intent: Frail Elderly Supported Services - Package

House of Happiness - Agency



- Click on the download button when a new screen appears.



- Save your Signature Page PDF document on your computer in a place you will be able to find it.
- Print the signature page
- Obtain all signatures required. These written responses can be anywhere in the white part of the page. **BE SURE PRINTED NAME AND DATE ARE LEGIALBE.**
 - Print name of the Executive Director/ President / CEO of the Agency
 - Signature of the Executive Director/ President / CEO of the Agency
 - Date of the Signature of the Executive Director/ President / CEO of the Agency
- Scan the signed signature page and email it to jointrfpinfo@dayton-unitedway.org or hand deliver to 33 West First Street, Suite 500, Dayton, Ohio 45402. There will be no receipts given for hand delivered documents.

Print Complete Letter of Intent: Frail Elderly

Click on the Main Menu or use your return button to get back to the Package Screen

Welcome Melonya

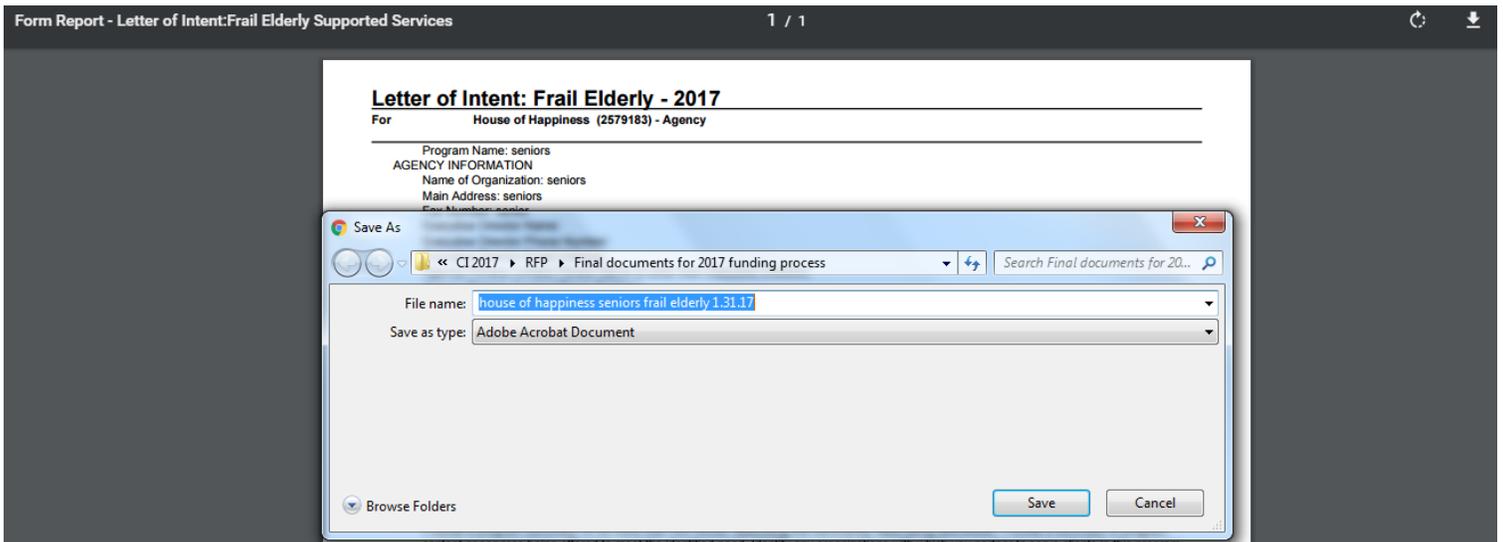


Packages

Due Date		Description	Status
Mar 4, 2017		Letter of Intent: Core Services	Outstanding
Mar 4, 2017		Letter of Intent: Frail Elderly Supported Services	Outstanding
Mar 4, 2017		Letter of Intent: General Supported Services	Outstanding

Click the Printer Button  beside the Letter of Intent Frail Elderly Package

- Click on the download button when a new screen appears.
- Be sure to give your file a correct file name. I would suggest following the example in the photo below. Agency name core services date (house of happiness Frail Elderly 1.31.17)
- Save the pdf of the COMPLETE LETTER OF INTENT PACKAGE in a folder you can find easily on your computer.



- **IF A PACKAGE HAS MULTIPLE FORMS OF THE SAME TYPE THE PACKAGE WILL ALWAYS READ OUTSTANDING.**

Letter of Intent – General Supported Services

- Click on the link in the Log In email you received from jointrfpinfo@dayton-unitedway.org

You will see your name at the top of the Packages Screen on the right.

- Click on the Letter of Intent: General Supported Services

Welcome Melonya

Main Menu

- ▶ Combined Funding Application Phase 1: LOI
- ▶ My Output(s)
- ▶ Logoff

Packages

Due Date		Description
Mar 4, 2017	 	Letter of Intent: Core Services
Mar 4, 2017	 	Letter of Intent: Frail Elderly Supported Services
Mar 4, 2017	 	Letter of Intent: General Supported Services

Now you are in the General Supported Services Package.

In the photo below you will see 3 forms that must be completed to submit a letter of intent for a General Supported Services Project.

Letter of Intent: General Supported Services - Package

House of Happiness - Agency

	Section
 	Letter of Intent: General Supported Services
 	Program Collaborator Identification
 	LOI Signature Page - General Supported Services



Click on form 1: [Letter of Intent General Supported Services](#)

- Answer all questions about your agency, project, and funding requests.

Continued - Letter of Intent – General Supported Services

Please note: In this form you will choose the Focus Area and Priority the **Project** will focus on.

Below are the focus areas and the Priority Areas you can choose from for each of the focus areas.

Focus Area	Priority
Education and Life Skills	Kindergarten Readiness
	3 rd Grade Reading Proficiency
	8 th Grade Math Proficiency
	High School Graduation
	Career Ready/Post-Secondary Credentials
Health and Safety	Food Access
	Domestic Violence/Intimate Partner Violence
Income and Stability	Stable Employment

The first question under Project Information asks: With which Focus Area and Priority Area does this Project Align?

- Click on the drop down menu and chose the focus area. When you have chosen the focus area a new box will ask you to choose the Priority Area.

The screenshot shows a form titled "PROJECT INFORMATION". The first question is "With which Focus Area and Priority Area does this Project Align?". There is a dropdown menu for "Focus Area" currently set to "Education and Life Skills". Below it is a dropdown menu for "Priority Area" with options: "Career Ready/Post-Secondary Credentials", "3rd Grade Reading Proficiency", "8th Grade Math Proficiency", "High School Graduation", and "Kindergarten Readiness". There is also a text input field for "25 word description of Project*".

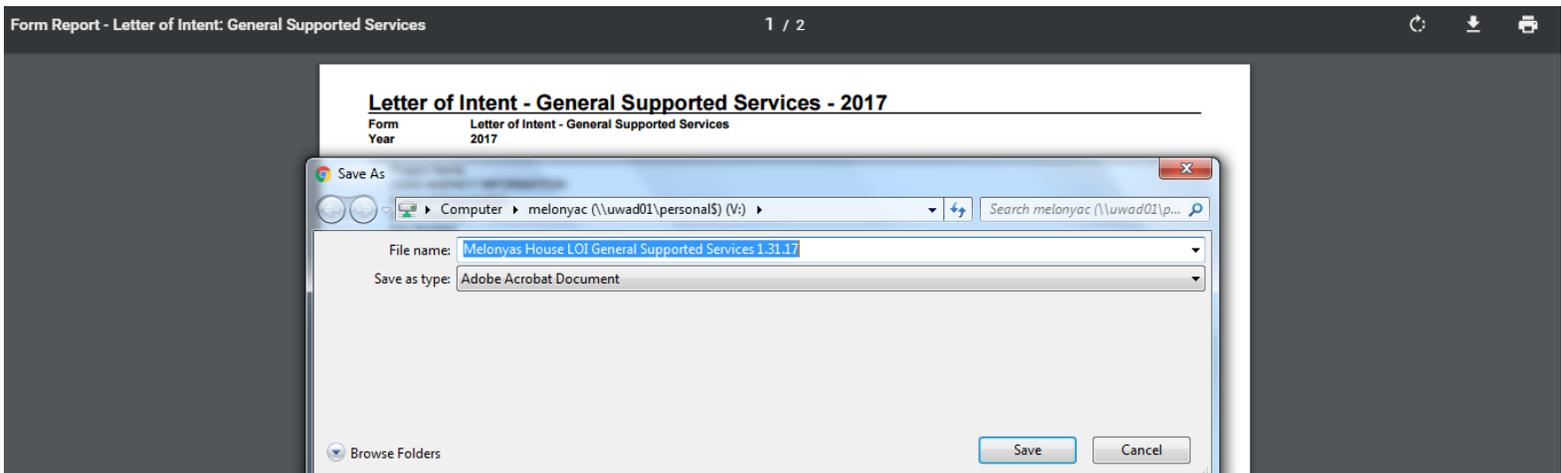
- Respond to each question in the form.
- Save your responses often by clicking on the save button at the bottom of the form.



- To make changes to any form click the  update form button. **You must have saved your responses into the form by clicking the save button and then ALWAYS click on the update form button to work in a new form or to see the changes you made to the form you were working in.** You will not see changes you saved to your forms until you

Continued - Letter of Intent – General Supported Services

- When you finished entering all of your responses save them one more time and click the update button so you can see the changes to your responses. .
- Click the  button beside the Letter of Intent form that now reads your Projects Name.
- Click on the download button when a new screen appears.
- Save the PDF in a folder you can find easily on your computer.



- Review all responses on this pdf document. Make sure your Agency leadership has approved all the responses
- Make any updates needed to the responses by closing the PDF and returning to the online forms or logging back in to your the online forms and following the instructions for updating for the form.
- Continue to print the form until sure you do not need to make any more changes to this form. **Don't forget to click save and update form after each update you make to your responses.**
- Click  when you are completely done with a form and the form has been approved by your Agency/Program leadership. ***Once you click submit you cannot make any changes to your data.*** If you accidentally hit Submit please contact send a request to jointrfpinfo@dayton-unitedway.org unlock the form.

How do I submit additional Letter(s) of Intent for General Supported Services?

- Click on the Letter of Intent: General Supported Services

NOTICE: The first Letter of Intent form you completed is now the name of the program you entered on the original form. See below – the form name is no longer Letter of Intent Core Services – it is the name of the program I entered as my Program Name response. On the top of the form you will notice it continues display the original form name.

Click the  Add a Form button beside the first form you completed. This will add an empty Letter of Intent form to the package.

Letter of Intent: General Supported Services

Melonya's House (5339387 - Agency)

Letter of Intent - General Supported Services ←

Form	Status
    Building Youth Together ←	Outstanding

Project Name →

- Complete this form just as you did the first form.
Save your responses often by clicking on the save button at the bottom of the form.

 Save
 Submit
 Return

- Each Letter of Intent form you add will display the Program name as the form name once you have clicked Save and clicked the update form button.
- To make changes to any form, click the  update form button in front of the form name for which you want to make changes/add responses. You must have saved your responses into the form by clicking the save button and **the update form button to see changes.** If you have multiple versions of the same form **YOU MUST CLICK THE PENCIL – UPDATE FORM button after clicking save.** Just clicking the save button will NOT show you the newly entered responses even when they are saved in the system.
- Continue to click the  Add Form button beside the first form in the package until you have completed a form for each PROJECT for which you intend to request funds.
- Enter responses for each form question just as you did in the first form. Save your responses often by clicking on the save button at the bottom of the form.
- When you finished entering all of your responses click the  button beside the form name.
- Follow the instructions for downloading under the Letter of Intent Form page. When you are sure you do not need to make any more changes to this form click the submit button at the bottom of the form like you did in the first form.
- Click  Submit when you are sure all responses have been approved by your Agency/Program leadership. **Once you click submit you cannot make any changes to your responses in that form.** If you accidentally hit Submit please send a request to jointrfpinfo@dayton-unitedway.org to unlock the form. **(FOR INSTRUCTIONS ON DELETING A FORM SEE THE NEXT PAGE)**

Program Collaborator Identification

- Click on Form 2: Program Collaborator Identification
- Lead Agency's completing a Letter of Intent for Supported Services must submit a Program Collaborator form identifying their program(s) that intend to request funds in this PROJECT.

Letter of Intent: General Supported Services - Package

House of Happiness - Agency

Section	
	Letter of Intent: General Supported Services
	Program Collaborator Identification ←
	LOI Signature Page - General Supported Services

To delete a Letter of Intent form change the first question response to DELETE and send an email to jointrfpinfo@dayton-unitedway.org and request for a form to be deleted. Include your phone number in the email. Deletions will only be made while a user is on the phone.

Return

- The first question in the form is the name of the Agency whose program is collaborating on the Project.
- Once you enter an Agency Name in the form, **save** your response, and click the **update form** button, **the form name will change to the name of that Agency.**
- In this form you must indicate what Focus Area and Priority Area the PROGRAM COLLABORATOR will focus on in the PROJECT.
- Choose from the drop down fields like you did in the Letter of Intent Form.

Form	Status
Program Collaborator Identification	Outstanding

COLLABORATION: Collaboration is a shared decision-making, shared resources and shared accountability among participating organizations and groups. It is an ongoing, collaborative effort that directly relates to the collective impact outcomes. Please include all confirmed PROGRAM Collaborators regardless of their intention to seek program funds in this process. Any partner not requesting funds should answer all questions or provide answers to all questions to their lead agency but are not required to submit the agency/financial documents.

Agency Name: *

Program Name: *

Program Focus and Priority Area:

Does this PROGRAM have an existing partnership with the lead agency of this project?

What is the role of the PROGRAM in the project? *

0 of 300 words

Estimated number of Unduplicated Clients to be served from July 1, 2017 - June 30, 2018?

Total PROGRAM Supported Services Request:

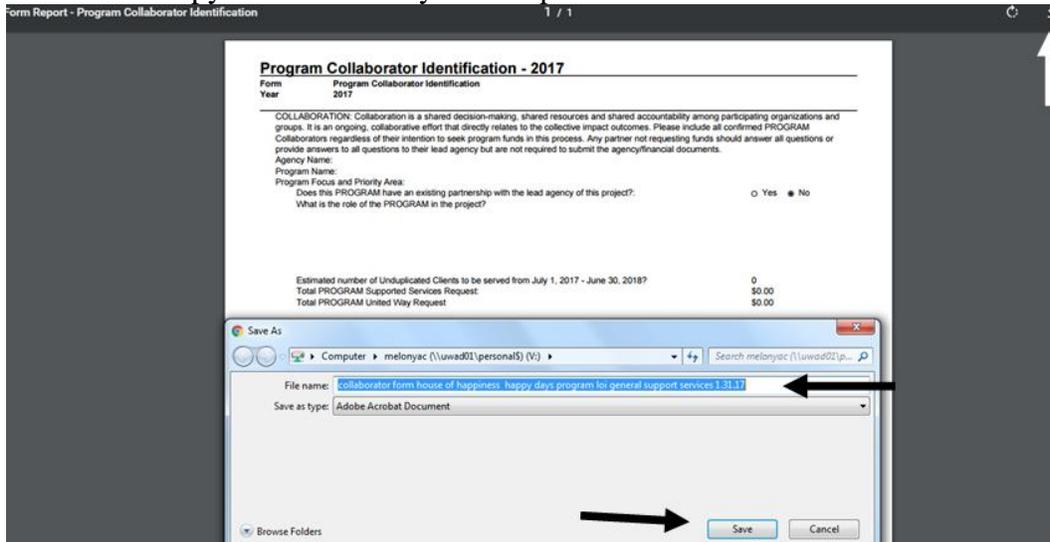
Total PROGRAM United Way Request:

Items marked with an asterisk() are required*

Save
 Submit
 Return

Continued - Program Collaborator Identification

- Answer all questions for the PROGRAM that is Collaborating on the PROJECT.
- Save your responses often by clicking on the save button at the bottom of the form.
- AFTER you have saved all the responses in the form and clicked the Update Form Button so all your responses will show in the form click the  button beside the form name.
- Save a copy of this PDF to your computer.



The screenshot shows a web browser window displaying a form titled "Program Collaborator Identification - 2017". The form includes a definition of collaboration, a section for "Program Name" and "Program Focus and Priority Area", and a table for "Estimated number of Unduplicated Clients to be served from July 1, 2017 - June 30, 2018?". The table has columns for "Total PROGRAM Supported Services Request" and "Total PROGRAM United Way Request", with values of "0" and "\$0.00" respectively. A "Save As" dialog box is open in the foreground, showing the file name "collaborator form house of happiness, happy days program loi general support services 1.31.17" and the save type "Adobe Acrobat Document". A black arrow points to the "Save" button in the dialog box. Another black arrow points to a document icon in the top right corner of the browser window.

- Review the completed form responses to ensure they are correct.
- Send a copy of this PDF to your contact at your Collaborating Program to ensure they also agree with all responses.
- Log back into the online forms or use the return button to go back to the package screen and open the Program Collaborator Identification Form to make any changes in the responses.
- Save your responses often by clicking on the save button at the bottom of the form.
- When you finished editing responses, click the  button beside the form name and continue to make updates until you are sure all responses are correct. Remember each Program Collaborator and your own Agency CEO/President/Executive Director must sign off on each General Support Services LETTER OF INTENT submission. So you need to be SURE all responses have been approved by all parties.
- Click  when you are sure all responses have been approved by your Agency/Program leadership. **Once you click submit you cannot make any changes to your responses in that form.** If you accidentally hit Submit please send a request to jointrfpinfo@dayton-unitedway.org to unlock the form.

How do I submit additional Program Collaborator Forms?

- To add additional Program Collaborator forms click the  Add a Form button beside the first Program Collaborator Form you completed. Remember this form will have the name of the Agency Name now.
- Lead Agencies must also submit a Program Collaborator form for the program(s) that will seek funds in the PROJECT.

Program Collaborator Identification



To delete a Letter of Intent form change the first question response to DELETE and send an email to jointrfpinfo@dayton-unitedway.org and request for a form to be deleted. Include your phone number in the email. Deletions will only be made while a user is on the phone.

Program Collaborator Identification

Form	Status
    House of Happiness	Outstanding

COLLABORATION: Collaboration is a shared decision-making, shared resources and shared accountability among participating organizations and groups. It is an ongoing, collaborative effort that directly relates to the collective impact outcomes. Please include all confirmed PROGRAM Collaborators regardless of their intention to seek program funds in this process. Any partner not requesting funds should answer all questions or provide answers to all questions to their lead agency but are not required to submit the agency/financial documents.

Agency Name: *

- Complete this process until there is a Program Collaborator form for each Agency with a program that is going to collaborate on this PROJECT. (including the Lead Agency's Program(s) in the Project.) This includes any agencies that are not requesting funds from this process but are collaborating with your PROJECT.
- Save your responses often by clicking on the save button at the bottom of the form



- Click the  update form button in front of the form to make changes/add responses. You must save your responses into the form by clicking the save button. **ALWAYS click on the update form button to see the changes you made in a form.** If you have multiple versions of the same form **YOU MUST CLICK THE PENCIL – UPDATE FORM button after clicking save.** Just clicking the save button will NOT show you the newly entered responses.
- When you finished entering and reviewing all of your responses click the  button beside the form name.
- Follow the instructions for downloading under the Letter of Intent Form page of this manual.
- Click  Submit when you are sure all responses have been approved by your Agency/Program leadership. **Once you click submit you cannot make any changes to your responses in that form.** If you accidentally hit Submit please send a request to jointrfpinfo@dayton-unitedway.org to unlock the form.

Continued – Additional Program Collaborator Forms

- Remember there are no rules on the number of Program Collaborators in a PROJECT.
- Remember a successful PROJECT will have Program Collaborators who are providing services/measuring outcomes across focus areas.
- Below is **ONE** example of a Collective Impact Project Design. There are no limits on the number of different Collective Impact Project Designs. **THE ONLY CONSTRAINT IS EVERY PROJECT MUST HAVE A MINIMUM OF ONE COLLABORATOR PROGRAM. NO SINGLE PROGRAM WILL RECEIVE FUNDS IN GENERAL SUPPORTED SERVICES.**

EXAMPLE OF A COLLECTIVE IMPACT PROJECT
Lead Agency A submits PROJECT –KIDS SUCCEED
Focus: Education;
Priority: 3 rd Grade Reading.
Agency A's program in the Project: READ4SUCCESS
Focus: Education;
Priority: 3rd grade reading;
Goal: To Expand quality of out-of-school (after school and summer) learning opportunities;
Evidence Based Strategy - provide the evidence based reading curriculum READ FOR SUCCESS to children K-3 rd grade.
Benefit/Outcome: Kids read at grade level in the 3 rd grade.
Funds Requested: United Way and General Supported Services
Agency B's program in the Project: HEALTHY KIDS
Focus: Health and Safety
Priority: Food Access
Goal: Improve access to nutritious food
Evidence Based Strategy: - provide an evidence based obesity/diabetes prevention curriculum kids, parents, and youth workers
Benefits - increase knowledge of good nutrition (health); better attendance at school (education) and work (income stability) ; access to quality programming (education)
Funds Requested: General Supported Services only
Agency C's program in the Project: BEFREE:
Focus –health;
Priority- Domestic Violence/Intimate Partner Violence;
Goal - Reduce domestic violence homicides;
Evidence Based Strategy - provide an age appropriate evidence based violence prevention curriculum to elementary and middle school youth
Benefits: kids do not engage in violent behavior (health); Kids have knowledge of resources to keep them safe at school
Funds Requested: No funds requested

Required Organizational Documents

Please submit all Organizational Documents by email to jointrfpinfo@dayton-unitedway.org
Documents may be delivered to United Way at 33 West First Street, Suite 500, Dayton, Ohio 45402

Use this check list to ensure you have submitted every document required.

NOTE: Program Collaborators NOT requesting funding DO NOT submit their Organizational Documents. Every Agency with a program applying for funds must submit the documents below.

	Audit - Most recent audited Financial Statements. Service Providers are expected to obtain an audit of their Financial Statements within six months of the end of their fiscal year. The audit is expected to be done within Generally Accepted Accounting Principles. The Audit must have a year-end no older than 12/31/2015. If your agency does not complete an audit, please provide a written explanation.
	Management Letter – If the most recent audit had a management letter (also known as internal control deficiency letter) with it, please submit a copy of that management letter and organization’s formal response. (A management letter is a detailed letter from the auditor that is usually addressed to the board of directors or the audit committee. It presents weaknesses identified during the audit and offers recommendations to address them.
	Tax Return - Most recent IRS Form 990 or 990EZ. The tax return must have a year-end no older than 12/31/2015).
	NOTE: You MUST SUBMIT an IRS Form 990/990EZ unless your organization is a church or other house of worship, and thus not required by the IRS to file a return. This exemption DOES NOT apply to general faith-based nonprofit service organizations.
	Current Budget - Most current Board-approved budget with comparison of previous year and current year-to-date actual revenues and expenditures.
	Board Roster – Most current roster of your Board of Directors indicating those who are officers, members of the Executive Committee, and all standing committees.
	Unaudited Financial Statements – Most recent financial statements, no earlier than December 2016, should include a Statement of Financial Position (Balance Sheet) and Statement of Activities (Income Statement).
	Patriot Act Compliance – If the Service Provider receives United Way funds and donations, in compliance with the USA PATRIOT (Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism) Act and other counterterrorism laws, the United Way requires that each Service Provider certify that United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes, and executive orders.
	Disclosures – Please list any major changes and/or circumstances, fraud, litigation, investigation, or other related occurrences since your most recent audit that would affect the financial health of your organization. If there are not any disclosures, please indicate such when completing the form online.
	IRS Determination Letter - Most recent IRS determination letter. This document is required only if an applicant agency is not currently receiving funding from Montgomery County or United Way.

Signature Page

Each Agency must submit a one Signature Page for every Project for which they intend on requesting funds.

Each Signature page must contain every Collaborating Program's Agency President/CEO/ Executive Director's printed name, signature, and date.

Click the  button beside the 3rd form: (there are no online responses needed in this form)

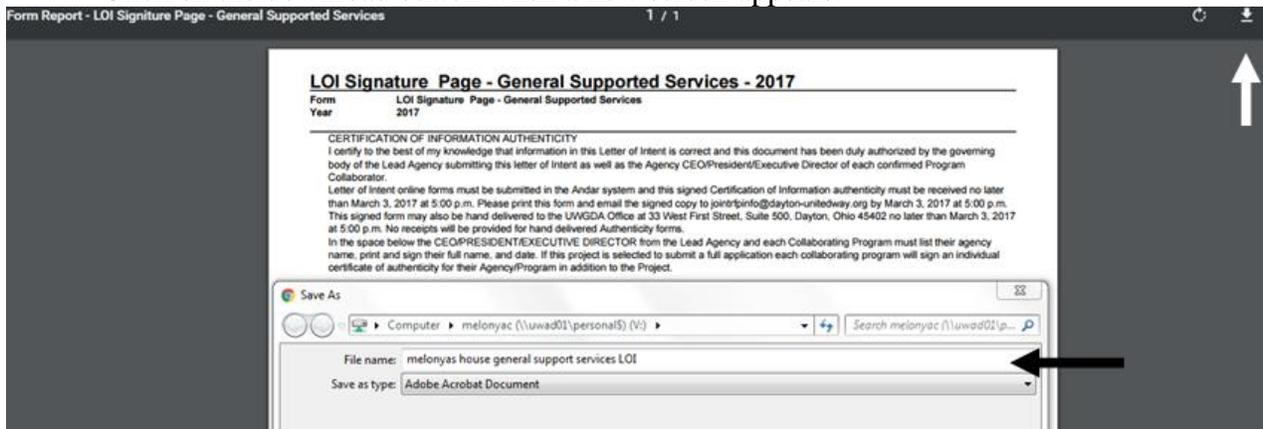
Letter of Intent: General Supported Services - Package

House of Happiness - Agency

Section	
 	Letter of Intent: General Supported Services
 	Program Collaborator Identification
 	LOI Signature Page - General Supported Services 

 Return

- Click on the download button when a new screen appears.



The screenshot shows a web browser displaying the "LOI Signature Page - General Supported Services - 2017" form. The form includes a "CERTIFICATION OF INFORMATION AUTHENTICITY" section with instructions for submission. Below the form, a "Save As" dialog box is open, showing the file name "melonyas house general support services LOI" and the file type "Adobe Acrobat Document". An arrow points to the "Save" button in the dialog box.

- Save your Signature Page PDF document on your computer in a place you will be able to find it.
- Print the signature page
- Obtain all signatures required. These written responses can be anywhere in the white part of the page. **BE SURE PRINTED NAME AND DATE ARE LEGIALBE.**
 - Print name of the Executive Director/ President / CEO of the Agency
 - Signature of the Executive Director/ President / CEO of the Agency
 - Date of the Signature of the Executive Director/ President / CEO of the Agency
- Scan the signed signature page and email it to jointrfpinfo@dayton-unitedway.org or hand deliver to 33 West First Street, Suite 500, Dayton, Ohio 45402. There will be no receipts given for hand delivered documents.

Print Complete Letter of Intent: General Supported Services

Click on the Main Menu or use your return button to get back to the Package Screen

Welcome Melonya

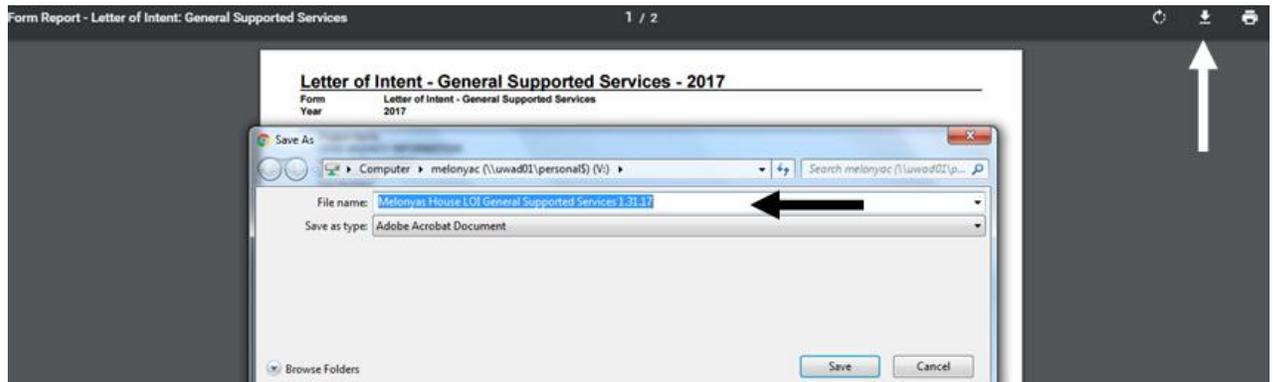


Packages

Due Date		Description	Status
Mar 4, 2017		Letter of Intent: Core Services	Outstanding
Mar 4, 2017		Letter of Intent: Frail Elderly Supported Services	Outstanding
Mar 4, 2017		Letter of Intent: General Supported Services	Outstanding

Click the Printer Button  beside the Letter of Intent Core Services Package

- Click on the download button when a new screen appears.
- Be sure to give your file a correct file name. I would suggest following the example in the photo below. Agency name core services date (house of happiness core services 1.31.17)
- Save the PDF of the COMPLETE LETTER OF INTENT PACKAGE in a folder you can find easily on your computer.



- **IF A PACKAGE HAS MULTIPLE FORMS OF THE SAME TYPE THE PACKAGE WILL ALWAYS READ OUTSTANDING.**