Training Agenda, Large Tier breakout room

1. Mock application
2. Scoring guidance walk-through, selected content
3. Wrap up and next steps
Mock application

“Camp Make a Difference” mock application available in Reviewr

Alex used this to walk through the Reviewr training

You can use also use it to familiarize yourself with the application and Reviewr in advance of receiving your proposals

Source of screen shots in remainder of training
Scoring guidance walk-through, selected content

Remainder of training focus on key definitions and tips for main sections

1. Why do it?
2. What should be done?
3. Is there capacity for the effort?
4. How much money is needed?
## Why do it?
### Key definitions and scoring concepts

<table>
<thead>
<tr>
<th>Large Tier Section &amp; Sub-section, if applicable</th>
<th>Components</th>
<th>Possible Scores</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why Do It? (RFP 25 points)</td>
<td>1. Description of CORE Condition/'Problem' or community need</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>2. Community strengths and assets</td>
<td>10</td>
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<tr>
<td></td>
<td>3. Inequities/Who is experiencing needs</td>
<td>5</td>
</tr>
</tbody>
</table>
Needs, defined

*Resources or conditions that are absent/insufficient for a particular group or community yet are necessary to thrive*

Should be (mostly) described in terms of resources or conditions, NOT services

- Access to affordable housing = need
- Shelter, rental assistance = services
Needs, scoring

CORE does not prioritize some kinds of needs over others

Score questions on how well applicants describe and make their case; NOT your own assessments of which needs are more important than others

While NOT scoring on CORE condition(s) selected, DO consider how well application links needs/challenges to the selected CORE condition(s)
Community strengths and assets

Definition:
The people, physical structures, places, community services, organizations, and businesses that can play a role in improving a community’s quality of life. Also referred to as resources or strengths.

Look for “strengths-based language” throughout this section

Strengths-based language definition:
Focuses on the innate strengths of individuals and communities rather than a problem or concern
### Examples of strengths-based language

<table>
<thead>
<tr>
<th>Conventional/deficits-based</th>
<th>Strengths-based</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Suffering with</strong></td>
<td>Working to recover from</td>
</tr>
<tr>
<td></td>
<td>Experiencing</td>
</tr>
<tr>
<td></td>
<td>Living with</td>
</tr>
<tr>
<td><strong>Weaknesses</strong></td>
<td>Barriers to change</td>
</tr>
<tr>
<td></td>
<td>Needs</td>
</tr>
<tr>
<td><strong>An addict</strong></td>
<td>A person diagnosed with an addiction</td>
</tr>
<tr>
<td><strong>Enable people to…</strong></td>
<td>Empower people to…</td>
</tr>
</tbody>
</table>
Equity & dimensions of equity

Equity is central to CORE

*Fairness or justice in the way people are treated, specifically: freedom from bias or favoritism. A program built on equity will address the needs of specific populations most likely to be affected by inequities by providing resources and opportunities such that they may thrive alongside other residents in the county.*

Applications must address some “dimension of equity”, (e.g., race, sex, age, gender, etc.) NOT required to focus on race
Inequities

Converse of equity

Definition

Systematic differences in the status of different population groups. These inequities have significant social and economic costs both to individuals and societies.
Use of data / information

All applicants required to use data and information to make their case

Want to see data that addresses all components in this section

Must state (i.e. cite) where data is from, but no specific format required

Can use Data Share and Community Indicators, but are not required to use these sources

Exemplary applications will use an array of data to tell a clear, cohesive ‘story’
Use of data / information

Uses quantitative data (numbers, statistics)

Quantitative data are from valid & reliable sources

Sources whose origins and methods can be verified; or produced by an entity with a history of producing accurate information related to social services and policy

May also include qualitative data (stories, quotes)

Uses a broad array of data, i.e., data from multiple sources and types

Aside from the anecdotal stories we have, there is also significant research that demonstrates the impact of one-on-one mentorship can have on outcomes for children experiencing childhood trauma, including those in the child welfare system. One such research study was a longitudinal study was conducted by We Care Family Programs (2015-2020) surveying emancipating foster youth at various intervals after age 18. A key finding showed...
What should be done?
Key definitions and scoring tips

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<tbody>
<tr>
<td>What should be done? (RFP 30 points)</td>
<td>Program/project description &amp; outcomes</td>
<td>4. Program/project description</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5. Measurable outcomes</td>
<td>5</td>
</tr>
<tr>
<td>Why Will It Work?</td>
<td></td>
<td>6. Supporting information, data, and evidence</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7. Data collection, use, and learning plans</td>
<td>5</td>
</tr>
<tr>
<td>Who are the People Served?</td>
<td></td>
<td>8. People who will be served</td>
<td>5</td>
</tr>
</tbody>
</table>
Program / project description & outcomes sub-section

Must propose direct services

Consider narrative response and outcomes “metrics”

Can identify up to five (5) outcomes metrics

Quality more important than number, i.e., outcomes consistent with activities/strategies and community challenges/strengths

Ideally, want metrics on whether people are better off (rather than quality of service)
Why will it work? sub-section

Consider narrative responses and list of programs/practices

Identify **up to five (5)** programs/practices

Quality more important than number

Does not matter where programs/practices fall on CORE Continuum of Evidence

Score on the quality of information and argument application uses to explain why a program/practice will work

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**WHY WILL IT WORK**

In this section, applicants will describe why they think the proposed services will be effective. Applicants will be asked to list programs or practices that will be implemented in order to meet the outcomes and identify where they fall on the CORE Continuum of Evidence. More information about the Continuum of Evidence can be found here.

Summarize the information that tells you the proposed program/project will meet the intended outcomes and influence the inequities stated.*

* Our program has over three decades of stability and a proven track record of making a difference for the population we serve. We have a high retention rate of campers and counselors which allows us to continue to provide a space to foster/build that mentoring relationship. Additionally, many of our campers grow up to be our volunteer counselors and share what the experience of being part of our program has meant to them.

Our current director, John, for example, was one of the first campers that attended in 1985, began volunteering at age 15 and eventually took on the role of director. He has maintained a relationship not only with his former counselor, but many of his own campers, who now are back volunteering and being mentors to the next generations. He often shares his experience of feeling different and isolated from his peers as a child and how a camp program gave him opportunities to feel included in such a space which he felt was right.

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**What is the name of the specific program or practice that will be implemented to meet the outcomes?**

The specific practice we are implementing is one-on-one mentorship.

**WHERE DOES THE SPECIFIC PROGRAM OR PRACTICE FALL ON THE CONTINUUM OF EVIDENCE?**

- Effective Practice

**What is the name of the specific program or practice that will be implemented to meet the outcomes?**

**WHERE DOES THE SPECIFIC PROGRAM OR PRACTICE FALL ON THE CONTINUUM OF EVIDENCE?**

- Effective Practice
Who are the people served? sub-section

Description of people to be served should relate to those experiencing inequities (as described in Why do it? section)

CORE funds intended to serve people living in County of Santa Cruz

- If applicant proposes a large proportion of serving people who do not live in the County, consider in scoring

Some applicants may not collect all demographics requested in tables

- OK for applicants to enter “Data not collected” (or something similar); just need to include something in these tables
- Do not penalize these applicants
What is the organizational capacity?  
Key definitions and scoring concepts

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<tr>
<td>Organizational Capacity (RFP 25 points)</td>
<td></td>
<td>9. Agency capacity</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10. Operationalizing equity</td>
<td>10</td>
</tr>
</tbody>
</table>
Operationalizing equity

Applicants asked how they operationalize equity in their organization.

Flexible and agency-specific approach.

Can describe plans and/or practices for operationalizing equity.
Operationalizing equity, examples

• Staff attends diversity trainings yearly.
• Staff are diverse and reflect the clients being served at all levels of the agency (support staff, management, senior leadership, board of directors).
• Agency employees those with Lived Experience or have used their services.
• Agency centers community/client voices. (e.g., lived experience on board of directors, community organizing, client surveys, etc.)
• Agency gathers information from community and staff on how the issue benefits or burdens the community in terms of racial equity
• Leadership communicates key community outcomes for equity.
# How much money is needed?

## Key definitions and scoring tips

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<tr>
<td></td>
<td>How much money is needed? (RFP 20 points)</td>
<td>11. Budget</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td></td>
<td>12. Budget description</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td></td>
<td>13. Financial health [auditor scores]</td>
<td>10</td>
</tr>
</tbody>
</table>
Budget forms and narrative

Budget worksheets have one row for non-personnel costs

Some agencies added rows, some just used one

Either approach is ok

Do not penalize agencies that just used one row because instructions were not clear

<table>
<thead>
<tr>
<th>Program Name</th>
<th>Agency Name:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PERSONNEL</strong></td>
<td></td>
</tr>
<tr>
<td><strong>POSITION TITLE</strong></td>
<td>FTE</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>PERSONNEL SUBTOTAL</td>
<td>$0</td>
</tr>
<tr>
<td><strong>NON-PERSONNEL</strong></td>
<td></td>
</tr>
<tr>
<td>ADMIN AND NON-PERSONNEL SUBTOTAL</td>
<td>$0</td>
</tr>
<tr>
<td>ADMIN OVERHEAD</td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>$0</td>
</tr>
</tbody>
</table>
Administrative rate, if requested

RFP allows for administrative / indirect costs

Definition: *General administrative and/or facility costs anticipated by the agency to support the proposed services that cannot be readily identified specifically with a particular project or program. For example, depreciations on equipment, accounting or personnel department services, rent and utilities not otherwise identified specifically with the particular project or program.*

Applies to amount of funding requested, not entire program funded by other sources

Collaborative requests may be by each agencies’ program/project budget

**Applicants may provide a narrative to justify administrative rates over 10%**

We will notify you if any of your proposals have a rate over 10%
Budget & Budget Description components

**Budget component** has only 3 possible scores
- Inadequate
- Partial
- Satisfactory

Focus is on how well applicant followed instructions

**Budget Description component** has standard scoring levels
- Inadequate
- Partial
- Between Partial and Satisfactory
- Satisfactory
- Between Satisfactory and Exemplary
- Exemplary
Financial Health component

Applicants must submit agency Financial Statements

Financial Health component assesses Financial Statements

- Panelists DO NOT score this component
- County Auditor scores this component
- CORE Investment team will add Auditor score to Reviewr

Panelists DO score other components in the category

- Budget component
- Budget description component
## CORE Institute Videos & Materials


<table>
<thead>
<tr>
<th>Topic</th>
<th>YouTube Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction to Collective Impact</td>
<td><a href="https://youtu.be/zNEObex5jo8">https://youtu.be/zNEObex5jo8</a></td>
</tr>
<tr>
<td>Exploring the CORE Conditions of Health &amp; Well-being</td>
<td><a href="https://youtu.be/Yc-idQ0qzPg">https://youtu.be/Yc-idQ0qzPg</a></td>
</tr>
<tr>
<td>Developing a Theory of Change and Logic Model with an Equity Lens</td>
<td><a href="https://youtu.be/M1p5tRA5Uzk">https://youtu.be/M1p5tRA5Uzk</a></td>
</tr>
<tr>
<td>Using CORE Tools to Develop Your Proposal</td>
<td><a href="https://youtu.be/7g6EA7LBOhA">https://youtu.be/7g6EA7LBOhA</a></td>
</tr>
<tr>
<td>Using Data and Stories for Continuous Learning and Improvement</td>
<td><a href="https://youtu.be/Lx-6CmVbP_A">https://youtu.be/Lx-6CmVbP_A</a></td>
</tr>
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</table>
Wrap up and next steps

1. Timeline
   • March 18  Panelists receive proposals, after they have filled out forms
   • March 31  Panelists scores due
   • April 8   Panel follow-up discussions, if needed

2. Check-in email from us next week

3. Contact CORE Investments team with any questions
   COREReview@Santacruzcounty.us
   We’ll respond within 2 business days

4. Complete Survey on Training – appears in your web-browser once you leave the meeting