Training Agenda, Targeted Impact Breakout Room

1. Collective Impact

2. Scoring matrix walk-through, selected content

3. Wrap up and next steps
What is Collective Impact?

Collective impact is a type of collaboration that brings people together in a structured way to achieve social change.

https://www.collectiveimpactforum.org/what-collective-impact
1. **A common agenda**, collectively defining the problem and creating a shared vision to solve it

2. **Shared measurement**, agreeing to track progress in the same way, which allows for continuous learning, improvement, and accountability

3. **Mutually reinforcing activities**, coordinating different activities to maximize the end result

4. **Continuous communication**, helping to build trust and relationships

5. **A “backbone” team**, dedicated to orchestrating the work of the group

https://www.collectiveimpactforum.org/what-collective-impact
Principles of Collective Impact

1. Design and implement the initiative with a priority placed on **equity**
2. Include **community members** in the collaborative
3. Recruit and co-create with **cross-sector** partners
4. Use data to continuously **learn, adapt, and improve**
5. Cultivate leaders with unique **system leadership** skills
6. Focus on program and **system strategies**
7. Build a culture that fosters **relationships, trust, and respect** across participants
8. Customize for **local context**

https://www.collectiveimpactforum.org/what-collective-impact
Targeted Impact Grant Intentions (CORE RFP, p 5)

Respond to community needs and racial inequities

Align efforts behind common agenda and community aspiration

Foster a movement, address root causes of inequities

Continuous communication, authentic community engagement

Common measurement framework

Engage partners in mutually reinforcing activities, especially leveraging funding
Scoring guidance will support your review

Reviewer matrix provides component-specific guidance

Read the matrix to assign most appropriate score

Pick score that best describes the characteristics of the application

• Must meet all elements to receive score
Scoring matrix 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>Targeted Impact</th>
<th>Components</th>
<th>Possible Scores</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Why Do It?</strong> (RFP 25 points)</td>
<td>1. Community challenges/needs and inequities</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>2. Community strengths and assets</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>3. Historical structural/system factors</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
- Emergency shelters, 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.
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>Suffering with</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>Weaknesses</td>
<td>Barriers to change</td>
</tr>
<tr>
<td></td>
<td>Needs</td>
</tr>
<tr>
<td>An addict</td>
<td>A person diagnosed with an addiction</td>
</tr>
<tr>
<td>Enable people to…</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 focus racial equity**

MAY ALSO focus on additional “dimensions of equity”, for example addressing equity based on other demographics and social identity (e.g., sex, age, gender, etc.)
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.
Intersectionality

Definition

References intersecting categorizations of people such as race, gender, age, and more

Acknowledges individuals can hold multiple identities at the same time

For example, someone may identify as Black, a woman, and non-abled bodied

When identities intersect, unique experiences and needs should be considered when developing program strategies and services

Consider especially in scoring guidance on Community Challenges, Needs, and Inequities component
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 BOTH quantitative data (numbers, statistics) AND qualitative data (stories, quotes)

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*

Uses a broad array of data, i.e., data from multiple sources and types
## What should be done?
### Key definitions and scoring tips

<table>
<thead>
<tr>
<th>Targeted Impact</th>
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<th>Possible Scores</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What should be done? (RFP 30 points)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Program/project description &amp; outcomes</strong></td>
<td>4. Direct services</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>5. Capacity building</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>6. Measurable outcomes</td>
<td>5</td>
</tr>
<tr>
<td><strong>Why Will It Work?</strong></td>
<td>7. Supporting information, data, and evidence</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>8. Data and evaluation practices</td>
<td>5</td>
</tr>
<tr>
<td><strong>Who are the People Served?</strong></td>
<td>9. People who will be served</td>
<td>5</td>
</tr>
</tbody>
</table>
Program / project description & outcomes

Must propose direct services AND capacity building activities

Capacity building definition:

*The process of developing and strengthening the skills, abilities, processes and resources of individuals, organizations, and communities.*
Program / project description & outcomes

Consider narrative responses and outcomes “metrics”

Can identify **up to eight (8)** outcomes metrics

Quality more important than number, i.e., outcomes consistent with direct services and capacity building efforts

Ideally, want metrics on whether people are better off (rather than quality of service)

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### What should be done?

This section focuses on the program or project proposed and the participants served. This section has 3 primary components: What are the Services? Why will it work? and Who are the people served? Additional information can be found in the RFP under section 6.1.3.

#### WHAT ARE THE SERVICES?

In this section, applicants are asked to describe their program/project and anticipated outcomes. All applicants are encouraged to be as specific as possible. Funding is awarded annually, contingent upon availability of County and City funds, at the same amount for each year of the 3-year grant term. Therefore, applicants are encouraged to consider how this may impact proposed activities and outcomes.

Please describe the program/project’s primary activities (i.e. strategies), people who will participate and the anticipated outcomes. In comparison to activities, articulate greater detail on outcomes, especially those related to the inequities stated. If the proposed program will have multiple funding sources, please identify the activities and people served due to the funds requested and also summarize accomplishments if the “entire” program.

Our program is for children (8 to 13) who have experienced abuse or neglect (or are at risk) and is based on the concept that it only takes one healthy stable relationship to make a difference in the life of a child. With a camper-counselor ratio of 6:1, we aim to make a difference. This matching provides mentorship that continues each summer and throughout the year. Our camper-counselor pairs participate in a wide-variety of health and wellness activities, including physical exercise, creative expression, personal enrichment, and free time to socialize and build friendships. Activities are designed to promote an attitude of “I can”, provide opportunities where everyone can be successful and develop skills to face personal circumstances outside...

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### OUTCOMES

Below please identify up to three specific measurable outcomes of the program/project. Include the target for whom, and how it will be measured.

Example of Outcome “Metric”: Hispanic or Latino youth participating in the mentorship program will graduate from high school at the same or higher rate than the population overall.

#### Outcome #1

90% of campers that attend the summer program will continue to have ongoing contact with their counselor throughout the year.

#### Outcome #2

80% of parents/caregivers will be able to report out on at least one new/improved social skill their camper has demonstrates within six months of the summer program.
Why will it work? sub-section

Consider narrative responses and list of programs/practices

Identify **up to eight (8)** 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 grew up to be our volunteer counselors and have shared 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 1999, 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 his volunteer experience gave him something to look forward to each summer, where he felt a

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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 the County of Santa Cruz

• If applicant proposes a large proportion of serving people who do not live in the County, consider it in your 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

<table>
<thead>
<tr>
<th>Targeted Impact</th>
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<tbody>
<tr>
<td>Organizational Capacity (RFP 25 points)</td>
<td>10. Lead agency and partner capacity</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>11. Operationalizing and advancing equity</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>12. Leveraging existing partnerships</td>
<td>5</td>
</tr>
</tbody>
</table>
Lead agency and key partners

Should describe capacity of both lead agency and key partners
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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<th>Targeted Impact</th>
<th>Components</th>
<th>Possible Scores</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section &amp; Sub-section, if applicable</td>
<td>13. Budget and budget narrative</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>14. Leveraging funding</td>
<td>5</td>
</tr>
<tr>
<td>How much money is needed? (RFP 20 points)</td>
<td>15. 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>PERSONNEL</th>
<th>Year 1</th>
<th></th>
<th>Year 2</th>
<th></th>
<th>Year 3</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>POSITION TITLE</td>
<td>FTE</td>
<td>Requested Budget (benefits included)</td>
<td>Total Program Budget (including requested amount)</td>
<td>FTE</td>
<td>Requested Budget (benefits included)</td>
<td>Total Program Budget (including requested amount)</td>
</tr>
<tr>
<td>PERSONNEL SUBTOTAL</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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<td>$0</td>
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<tr>
<td>NON-PERSONNEL</td>
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<tr>
<td>ADMIN AND NON-PERSONNEL SUBTOTAL</td>
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<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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<tr>
<td>ADMIN OVERHEAD</td>
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<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>TOTAL</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
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</tbody>
</table>

Budget Narrative (please identify if personnel are bilingual)
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%
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 and budget narrative component
  Leveraging funding 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>
</tbody>
</table>
Wrap up and next steps

1. Timeline
   - March 18  Panelists receive proposals
   - 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