

# Engage Applicant Workshop

October 5, 2022  
10:00 a.m. – 1:00 p.m.



# Objectives

At the end of today's training, participants will:

1. Be able to identify how their work contributes to the Engage program goals.
2. Be able to identify a project for which they will seek funding.
3. Leave with a strong **Results Statement** for their project.

# Shifting Mindset

The Funder	The Investor
Focuses on mission, values and priorities	Is clear on results sought from the investment
Gets and grades proposal	Answers three questions: <ul style="list-style-type: none"><li>➤ What are we buying?</li><li>➤ Chances we will get it?</li><li>➤ Best use of money?</li></ul>
Sees the proposal as the predictor of success	Knows the difference between what you write and what you actually do
Forgets what you promise and demerits for late reports	Remembers what you promise and focuses on ROI and your learning

# Three Big Investor Questions

1. What results are we buying?
2. How likely is it?
3. Is this the best possible use of Foundation funds?

# Partner Benefits

- Easier to understand the investments the Foundation wants to make and if a project clearly contributes to the Foundation's desired results
- Builds your capacity to define, track and communicate results
- Creates a higher level of dialogue around projects internally and externally

Success is determined based on  
***results achieved*** and ***learnings applied***.



# Guiding Documents

Guidelines

Results Trails

# Our Goals

The Engage pillar focuses on our most underserved populations in the 10-parish Capital Area with these specific goals:

1. Decrease percentage of families who are liquid-asset poor
2. Increase healthcare utilization by families below the ALICE threshold
3. Decrease recidivism rate

# Our Approach

Three types of investments within this Initiative:

1. Direct Service (Program Support)
  - *What positive gains will occur for individual participants or communities?*
2. Partnerships & Collaborations
  - *How will your organizations work differently?*
  - *What will this enable you and others to do better?*
  - *How will collaboration improve effectiveness or efficiency while improving results for impacted individuals?*
3. Systems Change
  - *How will your work inform change on a macro-level, including influencing policy or changing service provider practices?*



# Our Operating Principles

The Foundation reviews each proposal with respect to available funds and responses to three overarching questions:

1. What will be the results from this project and how will we know when those results have been achieved?
2. How likely is it that this applicant can achieve the results they are proposing?
3. Is this the best possible use of Foundation funds given other opportunities before us?

# Investments

While the projects to be supported by this Initiative should be long-term in nature, partners may request investments up to three years, but investments will be made in one-year increments.

**Partners will be expected to report on progress and participate in learning sessions quarterly.**

Opportunities for additional support will be provided to partners who make meaningful progress toward the Engage results.

# Geography

- Greater Baton Rouge Area
  - Ascension
  - East Baton Rouge
  - East Feliciana
  - Iberville
  - Livingston
  - Pointe Coupee
  - St. Helena
  - St. James
  - West Baton Rouge
  - West Feliciana

# Results Trails

Represent accomplishments stakeholders will achieve in making progress toward our Engage goals.

Basis for metrics that all projects and programs report against throughout the year.

The arrow reflects the types of activities and programs that are offered to these individuals to help them start to move down the continuum of change.

Ultimately the Foundation wants to invest in more of the last result on the trails.

financial education,  
financial counseling,  
financial coaching,  
emergency benefits  
assistance, housing  
navigation, workforce  
programs, credit  
development, related  
building, and services

## Result Trail for: Liquid-Asset Poor

Desired Results: *Families build financial capability and stability.*

● Demonstrate new financial knowledge and skills

● Set financial goals and an action plan

● Begin to build new capacities and increase resources

● Use plan of action to follow a budget, create savings, or protect existing assets for the first time

● Maintain positive change in financial behaviors

● Build financial assets

● Preserve financial assets

preventative and/or  
basic care, mental and  
behavioral health care,  
dental health care,  
rehabilitation  
therapies, HIV/AIDS  
services, hemophilia,  
expansion of health  
care providers, health  
care navigation,  
benefits navigation,  
and providing avenues  
to make care  
affordable

## Result Trail for: Healthcare Utilization

Desired Results: *Families improve health outcomes.*

● Increase their awareness of care options

● Connect to a new care service

● Confirm positive change in their health indicators

● Improve their or their family's health status on a short-term basis through access to care

● Improve their or their family's health status on a long-term basis through access to care

education,  
job readiness, life  
and soft skills,  
parenting skills,  
family  
reunification,  
faith-based  
support,  
mentoring,  
employment,  
health services

## Result Trail for: Incarcerated and Formerly Incarcerated

Desired Results: *Successfully Reenter The Community*

Become aware of reentry services and choose to participate

Agree to reentry plan objectives, services, and actions while incarcerated and up to 3 years post incarceration

Begin to build new capacities and increase readiness resources

Demonstrate new skills or capacity including: job readiness; social, family and spiritual supports; housing; mental health or substance abuse recovery; medication and treatment support; and financial obligations and parenting skills

Demonstrate resources required for success, including medications and connection to ongoing health and mental health treatment, complying with probation and parole and continue pursuing reentry plan objectives including housing, employment, spiritual practice, recovery, and family re-unification

Confirm changes in behavior have led to stable life conditions (health care, housing, recovery, employment, social and spiritual supports)

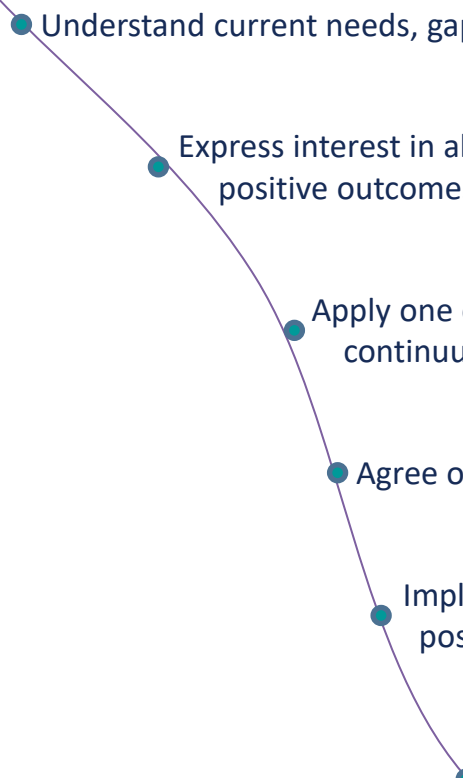
Maintain stable life conditions for at least 6 months

Successfully reintegrate into the community for at least 3 years after incarceration

training,  
convening,  
professional  
development,  
technology  
solutions,  
best practice  
pilots

## Result Trail for: Partnerships and Collaborations

Desired Results: *Build capacity to deliver a continuum of services*

- 
- Understand current needs, gaps, and barriers facing target population
  - Express interest in aligning/providing support and resources to maximize positive outcomes for target population
  - Apply one or more best practices and/or collaborate for a seamless continuum of success
  - Agree on measurable results from the changes
  - Implement the changes on their own or collaboratively and confirm positive gains for the target population
  - Communicate results and learnings, and encourage additional partners to apply best practices and data sharing



training,  
convening,  
white papers,  
applied research,  
best practice  
pilots,  
advocacy efforts

## Result Trail for: **Systems Change**

Desired Results: *Promote effective policy and practice reform that support positive outcomes*

Become aware of the ineffectiveness and inequity of current systems negatively impacting target population

Understand specific restrictions in policies and practices create unnecessary barriers for target population

Express interest in supporting champions and educating others to make changes in policies and practices that improve conditions for target population

Commit to support champions and educate others to make changes in the law that improve conditions for target population

Actively support changes in policies and practices that improve conditions for target population

Encourage others to support changes in policies and practices that improve conditions for target population

Changes in policies and practices that improve conditions for target population



# Results-Focused Applications

Programmatic

Partnerships and Collaboration Building

Systems Change

# Application Sections

- Summary and Organizational Information
- Proposal Intent
- Results
- Tracking to Success
- Key People and Partners
- Attachments

# Results

19. Indicate in a Results Statement the changes in behavior or condition you expect your participants to achieve.

# Result Thinking

1. How do you define success, meaning the **results of your services/project**?
2. How do you **know for sure** when success has been achieved?
3. How do you know, throughout your project, that **you have enough time and money remaining** to achieve the success you have defined?

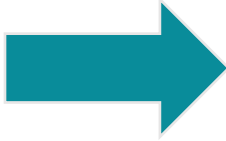
# Result Thinking

- We trained 100 employers on the benefits of hiring formerly incarcerated individuals
  - I counted 60 participants in our program who learned stress management and yoga techniques
  - We met with 100 legislators on the challenges of families who are liquid asset poor
- 10 employers trained hired one formerly incarcerated individual and employed them for 6 or more months
  - 40 participants reported engaging in yoga practices 30 minutes a day, 3 times per week and managing their anger, 8 weeks after the program was concluded
  - 45 legislators agreed to support our position and 3 agreed to co-sponsor a bill

# 4 Steps To Creating A Clear Result Statement

1. Identify the **change in behavior** you seek for your core participants

# Step 1: Identify the **change in behavior** you seek for your core participants

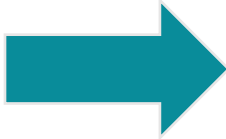
- Unemployed
  - Isolated from family and community
  - In poor health
- 
- Employed
  - Reconnected with family and community supports
  - Connected to needed health providers



# 4 Steps To Creating A Clear Result Statement

1. Identify the **change in behavior** you seek for your core participants
2. Specify the **degree of change** you consider a success

## Step 2: Specify the degree of change you consider to be success

- Employed
  - Reconnected with family and community supports
  - Connected to needed health providers
- 
- Gained and maintained living wage employment for 3 months
  - Connects with 3 family or community members 1 or more times per week
  - Maintains compliance with healthcare treatment plan for 6 months

## 4 Steps To Creating A Clear Result Statement

1. Identify the **change in behavior** you seek for your core participants
2. Specify the **degree of change** you consider a success
3. Estimate **how many** participants will be impacted or changed and **by when**

## **Step 3:** Estimate **how many** participants will be impacted or changed and **by when**

*When choosing the number of participants you will try to reach, consider the following:*

- Review similar projects and results
- Modify numbers based on the challenges facing participants
- Assess new and potential participants

## 4 Steps To Creating A Clear Result Statement

1. Identify the **change in behavior** you seek for your core participants
2. Specify the **degree of change** you consider a success
3. Estimate **how many** participants will be impacted or changed and **by when**
4. Express your result in a **structured statement**

## Step 4: Use a **structured format**

### Content Portions:

- What change
- To what degree
- By how many participants
- By when

## Step 4: Use a **structured format**

Content Portions:

- What change
- To what degree
- By how many participants
- By when

By \_\_\_(specific date), of the  
\_\_\_(# of participants) we serve,  
\_\_\_(# to achieve) will  
\_\_\_(change in behavior or  
condition).

## Step 4: Use a **structured format**

### Content Portions:

- What change
- To what degree
- By how many participants
- By when

By 12/31/23, of the 66 returning citizens we serve, at least 44 will connect with 3 family or community members 1 or more times per week and gain and maintain employment for 6 months.



## Step 4: Use a structured format

### Content Portions:

- What change
- To what degree
- By how many participants
- By when

By 12/31/22, of the 66 returning citizens we serve, at least 44 will connect with 3 family or community members 1 or more times per week and gain and maintain employment for 6 months.

# Results



- 20.** How will you verify the changes in behavior and condition for your participants? What information or evidence will you use to confirm the change has occurred?
- Existing data or measuring instruments
  - Easy to obtain documents
  - Observations and reports by others OR in some cases self-reported behaviors

## Exercise: Draft Your Own Result Statement

- Review the formats presented and choose the best structure for your project.
- Use the worksheet in your folder to draft a target statement for your project.
  - What does success look like?
  - How do you know when you have gotten there?
  - How do you know you have enough time and resources remaining to get there?

# Results

21. What Results do you expect your target population to achieve?

# Tracking to Success

22. What are the core elements of your project that are critical to participants achieving the stated results?
23. How will you track success during the grant period? Define quarterly participant milestones you will use to manage progress, and the quarterly key activities you or others will take to help participants accomplish each milestone.

# What is a Milestone?

- Milestones help you track what is important to ensure those you serve are on the road to success.
- Milestones show progression toward the Target Results and need to be structured in such a way that you can't hit the Target without achieving the milestones along the way.
- Milestones help you manage your program and your interaction with your participants. They are the points at which you can tell which of your participants are making progress and who is falling behind.

# Milestones

Target: By 12/31/2023, I will lose 20 pounds.

## Key Activities

Research weigh loss programs

Attend Meetings

Track food intake

5 servings of fruits and vegetables

Exercise 30 min 3x/wk

## Milestones

Sign up for weight loss program

5 pounds lost

10 pounds lost

# Milestones: Tracking to Success

Consider this basic flow of participant milestones (M) that predict success:

1. Participants show up and commit to the program
2. Participants engage and begin to benefit
3. Participants demonstrate initial success
4. Participants demonstrate stronger success

Target

Participants achieve the program target



# Milestones: Tracking to Success

Consider this basic flow of participant milestones (M) that predict success:

1. 50 Participants show up and commit to the program
2. 40 Participants engage and begin to benefit
3. 30 Participants demonstrate initial success
4. 15 Participants demonstrate stronger success

Target                      10 Participants achieve the program target

# Milestones: Tracking to Success

Consider this basic flow of participant milestones (M) that predict success:

1. 50 Participants sign up for weight loss program
2. 40 Participants attend weekly meetings for 1 month
3. 30 Participants lose 5 pounds
4. 15 Participants lose 10 pounds

Target                      10 Participants lose 20 pounds

# Milestones: Tracking to Success

## Common Elements of Good Milestones:

- Reflect key achievements as a result of the major activities being undertaken
- Happen over time – not simultaneously
- Reflect a ‘response’ or achievement progress in regular intervals
- Are time bound
- Define all key accomplishments that are anticipated prior to the result being achieved for the time period

# Milestones: Tracking to Success

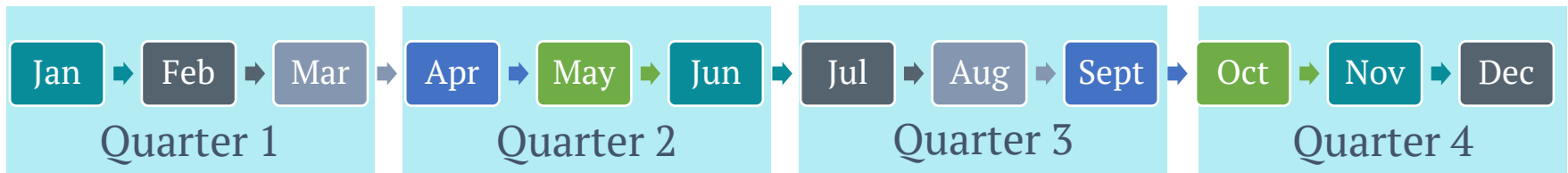
A mentoring program for returning citizens that assists in reducing isolation and increasing problem solving skills.

1. 30 agree to program goals and sign contract
2. 25 demonstrate new skills and use for 1st time w/in 30 days
3. 20 engage in mentoring relationship for 6 or more months
4. 15 confirm mentoring has reduced isolation and helped in solving one or more problems within the past 3 months

Target 10 confirm mentoring resulted in stabilizing life conditions

## Exercise: Draft Your Own Milestones

Think through your project and begin drafting the major achievements your participants will hit along the way to your desired result.



# Characteristics of Desired Projects

Favorable projects will:

- Be designed to produce and **verify** specific changes in systems, organizations and participants that directly contribute to the results we seek in the respective focus areas;
- Be effectively implemented and ultimately **continued without our funding**;
- Be **replicable** and can be shared with other organizations looking to produce similar results; and
- Use evidence-based practices and strategies and offer **clear results**.

# Three Burning Questions

- What are we buying?
- What are the chances we'll get it?
- Is this the best investment before us?

# Application Tips



- Focus on your main participant impact
- Be succinct and complete
- Be clear about what project funds will do
- Clarify how you will get to the project results
- Use resources provided



# Next Steps

Timeline

Online Application

Assistance

# 2022 Application Timeline

October 5	Applicant Workshop Applications available online
October 20	Open House TA: 10a-Noon & 1-3p
October 24	Open House TA: 9-11a & 2-4p
October 28	Applications Due by noon
November 14-18	Site Visits
December 23	Applicants Notified
January 1	Programs Begin

# Next Steps

- Online application is available on our website at [www.hawilsonfoundation.org](http://www.hawilsonfoundation.org).
- Virtual Open House Technical Assistance:
  - **Thursday, October 20: 10 a.m. to Noon and 1 p.m. to 3 p.m.**
  - **Monday, October 24: 9 a.m. to 11 a.m. & 2 p.m. to 4 p.m.**
- Application deadline is **10/28/22 at noon.**
- Selected Site Visits 11/14/22 through 11/18/22.
- Receive notifications no later than **12/23/22.**
- Kickoff Luncheon/Breakfast – **1/13/23**

# Feedback

We want your feedback!

<https://www.surveymonkey.com/r/EngageFeedbackForm>



# Contact Information

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