Community Investment Partnership
Thurston County Courthouse,
Building 1, Room 280,
Olympia  WA   98502

Agenda
Monday, February 9, 2015
2:00 – 4:00 p.m.

1. Welcome and Introductions

2. Review and approval of Minutes from January Meeting (attachment)

3. Reminder: The RFP has been released. (attachment: RFP and Timeline)
   Applications are due on March 13
   - Bidders Conference: New time and location
     February 18th, 3:30 – 5:00 p.m.
     Lewis-Mason-Thurston AAA
     2404 Heritage Ct SW, 98502

4. Select Review Committee Members (attachment: Potential Members)
   Child and Youth Resilience: Paul/Joan
   Financial and Residential Stability: Ben/Jeannine
   Healthy Choices and Behaviors: Faith and Virgil

5. 6 month status reports. Review Committee March Meeting (s)
   Follow the link below to download and review the 6 month status reports.
   A Dropbox user name/password is not necessary. Click here to view the reports in pdf format.

6. Adjourn

Next Meeting: March 9, 2015
Topics: ~Panel Review Process/ Chair Orientation
Steering Committee Meeting Minutes  
January 12, 2015  2:00 - 4:00 PM  
Thurston County Public Health & Social Services  
400 Lilly Road  
Olympia, Washington

Committee Members in Attendance:

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Attendance</th>
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</thead>
<tbody>
<tr>
<td>Virgil Clarkson</td>
<td>City of Lacey</td>
<td>X</td>
</tr>
<tr>
<td>Jeannine Roe</td>
<td>City of Olympia</td>
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<tr>
<td>Joan Cathey</td>
<td>City of Tumwater</td>
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<td>Sandra Romero</td>
<td>Thurston County</td>
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<td>Paul Knox</td>
<td>United Way</td>
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<tr>
<td>Dennis Mahar</td>
<td>United Way</td>
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<tr>
<td>Faith Trimble</td>
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<tr>
<td>Ben Morales</td>
<td>United Way</td>
<td>X</td>
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</tbody>
</table>

- Don Sloma, Gary Aden, Linda Abell: Thurston County  
- Sarah Kukkonen: United Way  

Welcome and Introductions  
The meeting was called to order at 2:05 PM by Co-Chair Dennis Mahar; Commissioner Sandra Romero was welcomed as the Thurston County Representative. Introductions were made.  

Agenda and Minutes Review  
Minutes from the last meeting were reviewed. Jeannine asked Virgil to clarify last month’s announcement of “The Lacey Challenge” and asked for the amount of funding that the City of Lacey is willing to increase. Virgil stated that both the City Director and the Finance Manager confirmed that funds are available and that the contribution would be the same as the former amount which was $86,000. Paul Knox moved to approve the minutes, Ben Morales seconded.  

Dennis led the group through a review of the agenda.  
The meeting dates and times for 2015 were reviewed. Members were in agreement to continue meeting on the 2\textsuperscript{nd} Monday of each month at the Thurston County Courthouse.
CIP – Approval of RFP and Timeline

**Timeline:** Paul provided an overview of the Operational Plan and Timeline and dates were confirmed. There was discussion about upcoming tasks for the months February and March. Dennis pointed out that our next meeting (February 9th) is the same day that the RFP will be released. Members felt comfortable with the timeline. Paul made a motion to approve the Operational Plan and Timeline, the motion was seconded by Virgil.

**Grant Instructions and Application:** Gary provided an overview of both the Application Instructions and the Grant Application and confirmed that it will be sent out to anyone who applied for or received funding from the CIP, HSRC, HOME, and United Way. All are asked to forward to anyone else in the community who may be interested.

Both documents were reviewed and edits were suggested, making sure that questions are consistent with outcomes and objectives stated in the documents. The series of questions on the Application Narrative were discussed and changes were recommended to the language about objectives, key measures, and leveraged or matching funds. Staff will make the changes. Virgil expressed concern because senior citizens are not named in the Priority Goal Areas section of the Application Instructions. There was agreement to add the language “for all ages”

Gary mentioned that two other RFP’s are being released within weeks of the CIP. Between HOME and the Tumwater CDBG, approximately $2.5 million dollars will be available for projects including affordable and homeless housing projects. Faith mentioned the RFP for Treatment Sales Tax will be released in the same period as well. Gary reminded members that while there will be overlap in the deadlines for the multiple RFP’s, the release dates follow federal guidelines which we cannot change. Members feel strongly about keeping lines of communication open between staff, providers and agencies during this busy timeline.

Members suggested creating a panel to preview the other RFP’s that are submitted in order to look for duplicate requests from agencies also seeking CIP funding. After discussion it became clear that this would be a large commitment and that there is not sufficient time available. Staff will review all requests for duplications. As a reference Gary offered to provide a list from last year’s funding cycle showing which agencies were awarded funds from each of the different sources.

Members wondered if the other local jurisdictions, including the HOME Consortium, are using the Thurston Thrives Strategies when making funding decisions. It was agreed that after this round of funding is awarded some time needs to be dedicated to having conversations with these other groups to discuss the Thurston Thrives Strategies, coordination of funding, cost sharing and maybe moving to a single RFP.

Faith asked if the Treatment Sales Tax RFP aligns with the Thurston Thrives Strategies. Sandra reported that the Thurston Thrives outcomes are indeed aligned with the funds.
Paul asked if Tumwater has a target project for their CDBG funds and Gary stated that they did not have anything specific and so they have decided to open the opportunity to the entire urban county with the exception of the city of Olympia who has their own CDBG entitlement. Gary explained that it would not be out of the question to invite and consider an Olympia project but that a formal agreement between the Thurston County and Tumwater would be required followed by an official request for approval by HUD.

Gary will incorporate the discussed changes to the RFP documents and then send electronically to members for comments. No response means members are fine with updates and changes.

2015 CIP Steering Committee Co-Chairs

Dennis Mahar has agreed to continue as Co-Chair and Sandra Romero agreed to take the second Co-Chair position. Virgil made a motion to approve Dennis Mahar and Sandra Romero as Co-Chairs on the CIP Steering Committee for 2015. Motion was seconded by Faith.

CIP Members & Review Committees – Roles

Members chose to serve as Co-Chairs on the following Review Panels:

- **Child and Youth Resilience:** Paul Knox / Joan Cathey
- **Financial and Residential Stability:** Ben Morales / Jeannine Roe
- **Healthy Choices and Behaviors:** Faith Trimble / Virgil Clarkson

CIP Steering Committee Co-Chairs Dennis Mahar and Sandra Romero will serve as the liaisons for Review Panels and the point of contact for agencies.

Sarah is heading the recruitment for 9 volunteers to serve on the Review Panels. Paul sent the volunteer information packet to steering committee members. Dennis encouraged all to distribute the announcement or provide Sarah’s contact information to interested community members. Applications from interested citizens will be reviewed at the February meeting.

**Next Steps and Next Meeting:**

- The Bidders Conference will be held February 18, members are welcome to attend.
- Select Members for Review Committees
- Report out: 2014 Funded Agencies at 6 months

The next meeting will be February 9, 2015.

With no further business, the meeting was adjourned by Co-Chair Dennis Mahar at 4:00 p.m.
<table>
<thead>
<tr>
<th>Month</th>
<th>Date</th>
<th>Event Description</th>
<th>Responsible Party</th>
</tr>
</thead>
</table>
| January | Final RFP and Review Process  
- CIP ID Panel Chairs  
- Recruit panel members | Approved By CIP Steering Committee  
Chairs will recruit with staff and CIP Staff |
|       | 1/30  | Panel member applications due                                                      |                   |
| February | 2/9  | **Regular CIP Meeting**  
RFP Released: Wide distribution, post on websites and email to groups.  
CIP decide which panel they will chair  
Panel members selected and informed | UWTC and HHSC    |
|        | 2/18  | **Host bidders conference @ LMTAAA  
2404 Heritage Ct SW / 3:30 – 5:00 PM**  
- Venue, program, invitations | Joint meeting with UWTC and HHSC to review RFP |
| March  | 3/9   | **Regular CIP Meeting** |                   |
|        | 3/13  | Applications due                                                                  | Submitted electronically via PDF |
|        | 3/18  | Threshold/technical review                                                         | Staff |
|        | 3/23  | Meet with Panel Chairs                                                            | Review process, tools, and leadership role |
|        | 3/26  | Host panel member’s orientation                                                    | Overview, roles, responsibilities, meeting dates and tools |
|        | 3/30  | Schedule agency interviews for each panel once panel dates are set                | Coordinate panel meetings with agency interviews |
| April  | 4/13  | **Regular CIP Meeting**                                                            |                   |
|        | 4/29  | Panels complete grant reviews and recommendations                                | Individual criteria ranking sheets, forced pairs and final panel priority lists are complete |
| May    | 5/5   | Prepare recommendations to CIP by panel chairs                                    | UWTC/HHSC         |
|        | 5/11  | **Regular CIP Meeting**                                                            |                   |
|        | 5/14  | Awards by CIP                                                                    |                   |
|        | 5/19  | Contracting  
- Use modified versions of existing contracts based on funding %  
- July 1, 2014 – June 30, 2015 | Thurston Co/United Way contracts |

**COMMUNITY INVESTMENT PARTNERSHIP**

**DRAFT CIP 2015 Operational Plan and Timeline**
<table>
<thead>
<tr>
<th>June</th>
<th>6/3</th>
<th>Review grant performance plan in preparation for 6 month progress reports due January 2015</th>
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<tr>
<td></td>
<td>6/8</td>
<td><strong>Regular CIP Meeting</strong></td>
</tr>
<tr>
<td>July</td>
<td>7/1</td>
<td>Contract Start date • Quarterly reimbursement</td>
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<tr>
<td></td>
<td>7/13</td>
<td><strong>Regular CIP Meeting</strong></td>
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<td></td>
<td>Begin planning for next cycle • Review Thurston Thrives results • Explore options for targeting objectives and desired outcomes</td>
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*Note: This document is a draft.*
Community Investment Partnership
Request for Proposal Information and Instructions

One Year Funding Period: July 1, 2015 – June 30, 2016
Application Deadline: 4:00 p.m., Friday, March 13, 2015
Proposals should be submitted electronically as a pdf file to two (2) email addresses:
lehra@co.thurston.wa.us and skukkonen@unitedway-thurston.org

The Request for Proposal (RFP) Process and Criteria
A single RFP from the Community Investment Partnership (CIP) is available February 9, 2015, for proposals to be submitted by March 13th and to be awarded by May 14, 2015. This funding will be for one year with programs starting on July 1, 2015 and ending June 30, 2016. The CIP proposal framework will use these priority goal areas:

- Prepare children and youth to be resilient, to learn and to succeed;
- Promote financial and residential stability for all ages; and
- Promote healthier choices and behaviors for all ages.

Please review and reference the priority goal areas, desired outcomes and objectives on page three (3). Building upon the initial work of Thurston Thrives (www.co.wa.us/health/thrives), we are seeking proposals that:

- Coordinate community assets (agency and community volunteer time, staff and other resources);
- Implement critical strategies that achieve measurable results; and
- Make a strong argument on how the results of their program align with desired Community Investment Partnership objectives.
- Serve as a catalyst to change existing large systems such as education or health care.

Important to Note

- Agencies requesting program funding must complete one (1) application for each proposed program.
- CIP grants do not support capital projects or endowment funds.
- When reviewing proposals for 2015, past performance will be considered.

Eligible Applicants

Entities eligible for CIP funding are: 1) private non-profit organizations meeting the statutory requirements under the IRS 501(C) (3) designation; 2) public non-profit organizations; 3) Tribes. All applicants must have established appropriate financial internal controls and accounting procedures to assure proper disbursement and accounting of funds provided. Applicants failing to meet these requirements will be ineligible for funding.
The Review and Selection Process

The review and selection process will be overseen by a Community Investment Partnership Steering Committee composed of four (4) Health and Human Services Council (HHSC) members and four (4) United Way representatives who will make the final award decisions. Preliminary reading, ratings, and selection recommendations will be done by citizen review committees and two members of the CIP Steering Committee who will serve as co-chairs of the review committees. Review Committee members will be composed of impartial, knowledgeable volunteers selected from throughout Thurston County because of their interest and knowledge about local community needs and will include representatives from Thurston Thrives action teams or advisory councils.

The CIP Steering Committee will make the final selections to be accepted by the Board of County Commissioners and the United Way of Thurston County Board.

In reviewing proposals, the Community Investment Partnership will base funding decisions on how well the proposed program aligns with the CIP’s priority goals and desired community results. Applications will also be rated on the following questions:

- **Organizational capacity including:**
  1. Is the organizational capacity and proposed budget sufficient to meet proposed outcomes?
  2. Does the organization have a proven track record and/or demonstrated capacity to undertake the proposed scale and complexity as described in the application?

- **Content expertise including:**
  1. How well does the application describe the compelling need, project design and objectives?
  2. Is the program’s design, structure and staffing appropriate to meet proposed outcomes?

- **Connectedness to the community including:**
  1. Does the organization demonstrate collaboration with other agencies to avoid duplication of effort and maximize service?
  2. Does the project leverage additional resources including volunteers, dollars and partnerships?
  3. How effectively does the project address current Thurston Thrives strategy maps?

Applications will receive greater consideration as they align more closely with the concepts in Thurston Thrives strategy maps listed on the website. An application that addresses three (3) Thurston Thrives strategy map concepts will score stronger than an application that addresses only one (1).

Grants will typically range from $7,500 to $50,000. Larger grants may be considered for those proposals demonstrating efficient collaboration with multiple organizations that result in increased efficiency, service or outreach.
**CIP Priority Goals, Desired Outcomes and Objectives Reference**

<table>
<thead>
<tr>
<th>Priority Goal Areas</th>
<th>Desired Outcomes</th>
<th>Thurston Thrives Content Areas</th>
<th>Objectives</th>
</tr>
</thead>
</table>
| Preparing children and youth to be resilient and to learn and succeed. | Children and youth have strengths to positively meet the challenges of life. | Child and Youth Resilience | • Build skills & competencies in parents & caregivers, children  
• Increase protective factors and reduce risk factors in individuals & families  
• Improve school outcomes for children & youth  
• Reduce problem behavior (mental health, domestic violence, drug and alcohol abuse)  
• Promote individual & family resilience  
• Increase convenience & safety of walking, bicycling, and transit  
• Residents are encouraged to walk, bicycle, and be active  
• Create safe, convenient, and abundant opportunities for physical activity  
• Everyone has the capacity to get a job and advance their career  
• Supported students overcome barriers & meet state academic standards  
• Increase the volume of healthy food to schools, institutions, and food banks  
• Empower landlords & tenants with information, education, and best practices to make better housing choices  
• Increase incomes so that people can afford market housing prices  
• Increase personal responsibility, financial, and banking literacy skill sets  
• Connect homeless or imminently homeless people to short-term help within 24 hours |
| Promoting financial and residential stability for families and individuals of all ages. | People are economically secure.  
Poverty is rare.  
The County has a competitive and skilled work force.  
People have a safe and affordable place to live. | Community Design |  
Economy  
Education  
Food  
Housing |
| Promoting healthier choices and behaviors for all ages. | Children are raised in a healthy, safe environment.  
Healthy, safe food is widely available. |  |

**Bidder’s Conference**

One orientation session for this funding cycle will be provided on February 18, 2015 from 3:30 – 5:00 p.m. at the Lewis-Mason-Thurston Area Agency on Aging, at 2404 Heritage Court SW; Olympia, WA 98502.

**Application Process**

1. Complete PDF File 1 - Application Materials  
   Please e-mail your application, with “(Your organization name) 2015 CIP Application” in the subject line.
2. Complete PDF File 2 - IRS Form 990  
   Please e-mail the most recent IRS Form 990, with “(Your organization name) 990” in the subject line.
3. Email both PDF files in separate emails to lehra@co.thurston.wa.us and skukkonen@unitedway-thurston.org no later than 4:00 p.m. on March 13, 2015. *Applications received after this date cannot be considered.*
An electronic version of this RFP can be obtained at:
http://www.co.thurston.wa.us/health/admin/funding/index.html and at

For questions regarding this RFP, contact either:
Sara Kukkonen at: (360) 943-2773 x 22 or skukkonen@unitedway-thurston.org
Gary Aden at (360) 867-2532 or adeng@co.thurston.wa.us

The CIP reserves the right to modify, reject or negotiate any proposals submitted with the proposing
organization prior to recommending funding of the proposal.

**Threshold Review**

The application has been submitted by the due date and time, provides all required elements including
coversheet, response to narrative questions in five pages or less, program and organizational financial forms,
logic model, list of current Board members with titles and affiliations, and has the signature of the Executive
Director or authorized agency official. An IRS Form 990 has been sent as a separate PDF file with
organization’s name in subject line.
## 2015 Community Investment Partnership Grant Application

**PDF File 1 - Application Materials**  
(Title this file: “(Your organization name) 2015 CIP Application”)

**Application Checklist:**

- [ ] Cover sheet  
- [ ] Narrative and Program Information (5 pages maximum)  
- [ ] Logic Model  
- [ ] Agency Financial Information form  
- [ ] Program Financial Information form  
- [ ] List of current Board members with titles and affiliations  
- [ ] Signature of Executive Director on cover page

**PDF File 2 - IRS Form 990**  
(Title this file: “(Your organization name) 990”)

- [ ] Most recent IRS form 990

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## Cover Sheet

<table>
<thead>
<tr>
<th>Organization Name</th>
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<tr>
<td></td>
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<tr>
<td>Program Name</td>
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<tr>
<td>-------------------</td>
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<tr>
<td></td>
</tr>
<tr>
<td>Amount Requested</td>
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<tr>
<td>CIP funding is requested to:</td>
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</table>
| - [ ] Start a new program  
| - [ ] Support operations of a current program  
| - [ ] Expand an established program  
|  
| Priority Goal area for funding: |  
| - [ ] Promote financial and residential stability for all ages  
| - [ ] Prepare children to and youth to be resilient, to learn and to succeed  
| - [ ] Promote healthier choices and behaviors for all ages  
|  
| Contact person for proposal |  
|  
| Primary contact e-mail address |  
|  
| Primary contact telephone |  
|  
| Organization’s mailing address |  
|  
| City, state, zip |  
|  
| Telephone |  
|  
| Organization’s Email: |  
|  
| Website: |  
|  
| Fax: |  
|  
| Name of Executive Director |  
|  
| Signature of Executive Director |  
|  
| Date |  

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**Application Deadline:** 4:00 p.m., Friday, March 13, 2015  

Proposals should be submitted electronically as a pdf file to two (2) email addresses:  
lehra@co.thurston.wa.us and skukkonen@unitedway-thurston.org
Please answer the following questions in five (5) total pages or less.

1. What is the specific problem/issue the project will solve or address?

2. What are the specific objectives and planned results of the proposed project and how do they align with Thurston Thrives objectives?

3. How will your organization implement the proposed project to accomplish the objectives?

4. Who else in the community is working on this problem/issue? Describe your collaborative work with these other organizations or groups specific to this request.

5. How will your organization know you’ve met your expected outcomes? What measurements will you use and what evaluation process will you use to collect that data?

6. What additional dollars are you leveraging and what would be the impact of not receiving full CIP funding for the project?

7. Describe the number of and roles for volunteers to help meet program outcomes.
CIP Grant Application Logic Model

Please complete this Logic Model which serves as a summary of program outcomes and outputs and a progress report template.

Program Title: ___________________________ Organization: ___________________________

Priority Goal Area: ___________________________

<table>
<thead>
<tr>
<th>PROGRAM PLAN</th>
<th>OUTCOME PLAN</th>
<th>MEASUREMENT PLAN</th>
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<tbody>
<tr>
<td>Inputs</td>
<td>Activities</td>
<td>Target Group</td>
</tr>
<tr>
<td>What We Have</td>
<td>What We Do</td>
<td>Who We Serve</td>
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<table>
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<tr>
<th>What We Will Accomplish and How We Will Measure It</th>
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<tr>
<th>Key Measurements and Measurement Tools</th>
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<tbody>
<tr>
<td>How We Will Know</td>
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At 6 months:

At 12 months:

2015-2016 CIP Grant Application
### FULL AGENCY Financial Information

*Double click on the table to activate Excel formulas. Click on the Word document to return to Word.*

*Be sure the yellow box is visible before returning Word.*

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<th>Fiscal Year:</th>
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<table>
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<tr>
<th>Dates:</th>
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<th>Current Fiscal Year to Date</th>
<th>Notes</th>
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</table>

#### REVENUES:

- Contributions: 0 0
- Special Events (net): 0 0
- Planned Giving/Endowment: 0 0
- United Way Grants: 0 0
- Grants/Contracts: Federal: 0 0
- Grants/Contracts: State: 0 0
- Grants/Contracts: Local: 0 0
- Grants: 0 0
- Other Grants / Contracts: 0 0
- Program Service Fees: 0 0
- Generated Revenues: 0 0
- Merchandise Revenues: 0 0
- Investment Income: 0 0
- Other Revenue: 0 0
- TOTAL REVENUE: 0 0

#### EXPENSES:

- Payroll (salaries, benefits): 0 0
- Insurance: 0 0
- Professional: 0 0
- Supplies/Phone/Postage: 0 0
- Rent/Mortgage & Utilities: 0 0
- Facilities Repair / Equipment: 0 0
- Printing, Copying and Transportation: 0 0
- Conferences and Meetings: 0 0
- Staff Training & Direct Assistance to: 0 0
- Membership Dues & Other Expenses (specify): 0 0
- TOTAL EXPENSES: 0 0
- Excess (Deficit): 0 0
### PROPOSED PROGRAM Financial Information

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Be sure the yellow box is visible before returning to Word.

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<td>Program Service Fees</td>
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<td>TOTAL EXPENSES</td>
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CIP funding will provide match funding for the revenue sources with an asterisk * in the NOTE section.
CIP Panel Applicants Area of Interest

Preparing Children and Youth to be Resilient, to Learn & to Succeed

- Barbara Burgener
- Denise Hagen*
- Ellen Shortt-Sanchez
- Joe Frederickson
- Lars Andreassen*
- Leatta Dahlhoff*

Promote Healthy Choices and Behaviors

- David J. Kapaun
- Kevin Haughton

Promoting Financial and Residential Stability

- Denise Hagen*
- Gretchen Bornstein
- Lars Andreassen*
- Leatta Dahlhoff*
- Patrick Maxson
- Tyler J. Adams
- Theresa Slusher

1.
1. **What interests you about serving as a CIP volunteer?** I am a big fan of the Thurston Thrive activities and I believe the strategy maps created show a variety of ways private and non-profits can use precious resources to focus on some common goals that move towards better outcomes for our county residents. I am a huge fan of collective impact and watched Thurston Thrives unfold around these sound principles:

   (a) a common agenda  
   (b) common measures of success  
   (c) activities that support each other 

   I believe having a foundation like Thurston Thrives that connects the Community Investment Partnership funds and common outcomes for grants is a brilliant strategy and I look forward to assisting.

2. **What skills or expertise do you bring to a funding panel?** Currently, I am the Program Manager for the Thurston County Treatment Sales Tax (TST) within the Thurston County Commissioners’ office. I am responsible for the accountability and performance of 24 Memorandums of Understanding (MOU) with county programs focusing on improving the quality of life for county residents struggling with substance abuse and mental health issues. Each year recommendations are made to the Board of County Commissioners on how best to spend almost $5 million of tax payer money.

   In the last three years I have been able to run 4 grant cycles with a dedicated community fund of $100,000 with huge support from the County Commissioners. Previous to this position I was a member of Governor’s Gregoire’s Accountability and Performance office where I did similar work on a statewide level and was a lead on Federal grants that came into the state during the American Recovery Act. I was also the lead in process improvement, the Management Framework and leadership training and conferences. In both these roles I have experience gathering knowledge and data through focus groups, needs assessments and surveys used to create policies and actions that can work on big problems and get results. In my current role we are looking at the impact of the Affordable Care Act, state and federal funding cuts and current legislative issues that will influence policy and funding decisions for the county. The strategies that worked last year may not be the best place to put the money in the future. The way we spend taxpayer dollars to tackle problems at their root will go a long way in making Thurston County the best place to live, work and play.

3. **Which of the three priority goal areas below interest you the most and why?** In my career my focus has been on programs for youth, community wellness efforts, education and women’s issues. I am happy to serve in any of the three areas but feel my expertise would be best in preparing children and youth to be resilient to learn and succeed. I do not sit on any community boards at this time and feel I can be a neutral third party reviewer that can assist in making funding recommendations to the Community Investment Partnership Steering Committee.
1. What interests you about serving as a Community Investment Partnership volunteer?
I have a strong belief and commitment in providing service to the community I live in and I believe that with the coordination of resources, the Community Investment Partnership can make a significant impact on high priority community social and health issues. Serving through the United Way has been to date the most effective way that I could help make an impact to our community. I believe that participating as a Community Investment Partnership volunteer will allow me to continue to make a difference.

2. What skills or expertise do you bring to a funding panel?
- Since 2001, I have participated in all but three of the United Way of Thurston County’s “Day of Caring.” (Absences due to two surgeries and a vacation).
- From 2002 to 2006, I was the United Way campaign coordinator for Intercity Transit.
- Recognized as Campaign Coordinator of the Year by the United Way in 2006.
- I have served on a United Way allocations panel continually since 2002 or 2003 (I believe it was in 2006 that I moved from the Education to the Health and Wellness panel.)
- As an experienced panel member, on numerous occasions I filled in for the panel chair conducting grant interviews and grant progress reviews. I also taught fellow panel members how to utilize the “Force Pairing” matrix.
- In 2012 and 2013 I chaired the United Way’s Health and Wellness panel and been a member of the Allocations Committee.
- **In 2014 I chaired the CIP’s “Promote Healthy Choices and Behaviors” Panel.**

Through the numerous years as an allocations panel member, I believe I have demonstrated an ability to be open minded, unbiased and assessed each program requesting funds in a fair, impartial manner. As a panel chair, my reports to the United Way and letters to the funded agencies show that I am capable of articulating questions and opinions in an open yet non-confrontational manner. Fellow panel members have commented on and appreciated my organizational skills and my preparation for each meeting.

3. Which of the three priority goal areas below interest you the most and why?
I would be happy and proud to serve in any of the three goal areas; however I believe I could best serve in the area of “promoting health and healthy behaviors.” Although I am not a member of the health profession, because of my extensive experience working on the United Way’s Health and Wellness allocation panel and chairing last year’s CIP “Promote Healthy Choices and Behaviors” Panel, I have considerable knowledge of the many grant requesting organizations in Thurston County that do provide these services as well as being able to provide assistance and continuity as this process continues.

3.
I’ve been involved with United Way in Thurston County for many years. It started with contributing in the workplace campaigns and supporting them in various ways when I was younger. I’ve been doing that for over 35 years. I’ve served as a Reading Buddy and currently serve as a member of the Volunteer Advisory Committee. I fully expect that I will continue to volunteer for United Way once I leave the workforce.

Over the years, I’ve watched what the United Way sponsored programs have done for people I know and attended events where I’ve heard people’s stories of how they are lifted up by United Way sponsored programs. I’m interested in continuing to learn about how the money is allocated from those workplace campaigns I’ve been involved with. Even greater than the funding part of the program, I think it would be an enriching experience to learn more about the programs that are in my community. What they do, who they help and how they help.

I’ve worked for WSECU for over 35 years in many capacities. I raised a family and earned my bachelor’s degree while working full time. I’m currently Vice President of People & Culture Services. My responsibilities include people development, working cooperatively with others on our large management team, as well as creation and management of a $17 million annual budget. I’ve also been a member of many project teams throughout my career to bring better services and products to members and employees.

I’m interested in two of the following three priority goals:

**Preparing children and youth to be resilient, to learn & to succeed** – Through various personal and professional experiences, I’ve seen young people who would have been more successful if they had been connected with community based services growing up. My experience with the Reading Buddy program has shown me that a small amount of time can make a big difference for a small child’s developmental success.

**Promoting financial and residential stability** – Besides believing in working hard to meet my own life goals, I’ve had years of experience with helping employees and members discover better ways to manage their finances and create a path to the future they look forward to.

From working in various positions within the credit union over the years, I understand the kinds of tools it takes to create a roadmap to financial and residential stability.
I am very interested in this process for a number of compelling reasons. My current role as Director of Center for Community Based Learning and Action at The Evergreen State College focuses on campus partnerships with the local and regional non-profit sector. This experience will help me to broaden my understanding of non-profit work, needs and resources. We also define student volunteers are resources and will gain a better understanding of how to deploy students to community initiatives. I have served on the United Way of Mason County process and felt it was an important way to learn about crucial work of local non-profit organizations and to participate in funding decisions that prioritize deep community impact. I respect the United Way model and am also interested to see new and upcoming models of collaboration for Community Investment.

I am a graduate of the MPA program at Evergreen with a focus on Non Profit Administration, and have a passion for the sector. I appreciate that this process will allow me to continue to connect with current issues in the non-profit world.

I bring a variety of skills and expertise to the funding panel. My background is in Education- including Adult and Family Literacy, Early Learning and Service Learning in Higher Education. I have also served as a Program Evaluator for Even Start family literacy and a parent representative in a School Improvement Process. Through this work I have built skills in program observation, constructive feedback, and coaching and mentoring toward program improvement.

I have worked in programs at non-profit organizations, school districts, correctional education and higher education and reflect on organizational development and structure.

I support AmeriCorps members at our site and student volunteers and have an understanding of best practices in Volunteer Management used by many non-profit organizations.

‘Preparing children and youth to be resilient, to learn and to succeed’ is the panel area that most interests me because of my work as an educator. I am especially interested in innovation to support children and youth in learning and see many great initiatives coming from the non-profit and public school sectors and that I would to know more about.

I understand this is a 20 hour commitment in April and May and would be happy to contribute. I do have to be out of town the week of April 6-10 and around Memorial Day weekend in May, but will otherwise make myself available and fully participate.
I've loved being involved with United Way of Thurston County over the last several years and look forward to continuing to volunteer my time and help out with our community! I was involved with the CIP panel last year and loved the experience. Even though I had been involved with United Way in a variety of capacities, serving on the panel last year was a huge learning experience and I loved learning more about some of the great agencies in our area!

As mentioned above, I've been very involved with United Way during the last couple years.
*2012 - Workplace Campaign Coordinator for Washington State Employee's Credit Union (also won Workplace Campaign of the Year at the annual awards luncheon) and helped increase campaign donations from $40,000 to $59,000.
*2012 - organized and led Washington State Employee's Credit Union team for Day of Caring, helping beautify the parking lot at SafePlace's headquarters
*2013 - served on the planning committee for the Women's Leadership Council's Power of the Purse event
*2013 - served on Washington State Employee's Credit Union workplace campaign committee
*2013 - organized and led Washington State Employee's Credit Union team for Day of Caring, helping with multiple projects at Nature Nurtures Farm
*2014 - served on the Childhood Resiliency panel for the Community Investment Partnership.
*2014 - volunteered with WSECU's team for Day of Caring, helping clean up downtown Olympia.

I love Olympia and am very invested in the welfare of our community-this is why I believe in United Way and have been volunteering my time and participating in different events. I realize that when we all give what we can (even if it is just a little), United Way can combine our funds and funnel the money to local agencies, who can work to improve and better our communities. I currently work in the Human Resources department at WSECU and am well versed in providing fair, unbiased, and balanced feedback. I am able to form opinions and ask questions in a calm, non-confrontational manner while keeping an open mind.

I strongly support all three goal areas of the CIP, however, this year, I would like to be considered for the "promoting financial and residential stability" panel. I learned so much last year that I would love the chance to learn about some other great agencies in our area. Working for a credit union, I am very passionate about helping our community become financially healthy. I am very excited at the prospect of helping decide which local agencies could receive grants to advance the common good of Thurston County residents, especially in the area of financial and residential stability.
As a United Way volunteer over the years in California and Idaho, I found that participating as a resource distribution volunteer helped provide a broader knowledge of agencies, their goals, and how they serve their clients.

My experience includes participation as a group member and in one instance having been the sole arbiter of grant applications and the resource distribution to the applicants.

My skills include those gained as a manager of people and processes for more than 30 years as a newspaper executive and contributions as a volunteer to many charitable and civic organizations. For example, I was a member of 12 non-profit boards when I retired in 2005; served as chairman of the Riverside, California Chamber of Commerce after five years progressing through the chairs, and was named “Community Leader of the Year” by the Community Foundation of Riverside and San Bernardino Counties in 2003.

I am particularly interested in “preparing children and youth to be resilient, to learn and to succeed.” This is so because of my childhood and teen years growing up on the eastside of Olympia, the son of a single mother, and living for many years in what was very close to poverty.

I am ready, willing and able to be a contributing volunteer as detailed in the list of responsibilities required.
7.
Kevin Haughton, M.D.
Primary Care Section Chief Providence Medical Group
1509 Lakemoor Loop SW Olympia, 98512
C: 360 556-6908   P: 360 493-4126  H:360 786-9353
United Way Board of Directors

1. What interests you about serving as a Community Investment Partnership volunteer?
   I believe this is the most important part of the work of UWTC. How do we support which efforts is even more important than fundraising. It is a great process.

2. What skills or expertise do you bring to a funding panel?
   This would be my fourth year of participation, and I think I am finally getting it down so that I could be a more productive participant.

3. Which of the three priority goal areas below interest you the most and why?
   Promoting health and healthy behavior
8.
Lars Andreassen
2801 Aberdeen Ct. SE
Olympia, WA, 98501
Landrssn@gmail.com
360-528-0875

1. I am very interested in serving as a Community Investment Partnership volunteer. I have a strong interest in this opportunity because I want to be involved in creating positive change in our community, and my background and skills make this an excellent way for me to contribute. I am particularly interested in the funding that goes to local programs to create change, an interest I have pursued as a Peace Corps volunteer, non-profit treasurer, and career in budget analysis. Also, while I have learned about the grant writing process and written a successful grant, this opportunity would allow me to learn about local community programs and be part of the grant review process.

2. I would bring valuable experience to the panel. I have nine years of experience in budget analysis at the Department of Ecology, with skills in organizing and managing significant budget projects and processes. I am a past Board member of several non-profit organizations, including treasurer of the Olympia non-profit Eastside Cooperative Preschool from 2012-2014 and treasurer of the Seattle non-profit Amigos de las Americas from 2002-2004. I was also a Peace Corps volunteer from 2004-2006 working with non-profits and businesses in Armenia, and working through many of the challenges of funding small local community programs. I also have a Masters in Public Administration from The Evergreen State College, which enhanced skills applicable to this opportunity like organizational development, governance, analysis, and non-profit management. In particular, I learned how to read and write grant applications in a grant writing course, along with writing a successful grant for the Olympia non-profit Child Care Action Council in 2013. I also conducted capacity building for Eastside Cooperative Preschool in 2014, working with their Board and members to create an organizational assessment, mission, vision, strategic plan, annual report and capital campaign launch plan.

3. I have the most interest in and background to serve the goal areas of either financial stability or child success. Financial stability of organizations and community is of most interest and fits well with my background in business, finance, budgeting and non-profit financial management. I have also gone through the process of working with non-profits to become more financially stable. The other area I have a strong interest and background is preparing children to succeed, since I have written a grant for a non-profit supporting children in our community, I have experience on the Board for my children’s preschool, and because I have my own young children growing up in this community.
1. What interests you about serving as a Community Investment Partnership volunteer?
   - This is a wonderful opportunity to collaborate with others to impact positive change in our community through strategic investments in local programs. I want to be part of this great change.

2. What skills or expertise do you bring to a funding panel?
   - I serve on the Service committee for Zonta Club of Olympia (since 2005) and chaired the Grant committee for Women’s Leadership Council in 2014. I am open minded and unbiased when considering applicants and their requests.

3. Which of the three priority goal areas below interest you the most and why?
   - Promoting financial and residential stability.
   - Preparing children and youth to be resilient, to learn and to succeed.

I am passionate about both listed above. They both fit into the mission and vision of WLC, which I am the Co-chair with Sandy Sinnett. They both fit into my passion to improve the lives of women and girls in our community. They align with the work I do through Zonta Club of Olympia, Expanding Your Horizons, YWCA of Olympia, and other nonprofit organizations I volunteer my time, talent, and resources to for many years.
As a resident of the Thurston County area for my entire life, I have pride in my community and home. I have been given the opportunity at my current employer to donate a portion of my income each pay period as well as serving on the workplace campaign committee. I have expressed interest to my fellow co-workers and campaign members that I have a desire to be more involved both in the community as well as United Way. My co-worker, Gretchen Bornstein, who has served on the workplace campaign committee for several years as well as the CIP panel, was kind enough to inform me that the CIP is looking for volunteers at this time. I feel strongly that this is exactly the kind of involvement that I’ve been looking for. To me this is an opportunity to invest in the community while helping others and learning about local non-profits involved in Thurston County. Serving in a partnership program that can create change through strategic planning and investments will also help me in my future endeavors to be involved with my community.

As mentioned above, I have been an active participant with my employer, WSECU, by serving on the workplace campaign committee as well as volunteering at the local Headstart ECAP program for low income families. I have 15 years of working in the customer service industry and 12 years of working in the banking industry—that has helped me to develop the skills necessary for working with a team and with the general public. In the banking industry I have worked in lending and accounting. Working in lending has given me the skills necessary to handle difficult conversations with members while delivering difficult loan decisions in a respectful and understanding fashion. This has also given me the opportunity to educate the members on financial stability and responsibilities in a non-threatening or offensive manner. In the accounting field I have increased my knowledge of financial responsibilities giving me a better understanding for financial planning and budget forecasts.

While I believe all three areas that are available with the Community Investment Partnership hold incredible value I would like to be considered for the “promoting financial residential stability” panel. I would really like the opportunity to learn more about local agencies and their involvement with the community. I feel that my years of financial experience with the WSECU that promotes active involvement with the community through financial fitness programs would be of great value to this panel. I am very excited to be given this opportunity and being involved in the decision to help local agencies receiving grants to better Thurston County.
I have spent the last 6 ½ years in Finance, worked the previous 5 years in public education, and was on the Community Investment Health Panel for the last 4 years, so my involvement in the community spans the spectrum of field experience.

To answer the questions:

1) Serving as a Community Investment Volunteer would allow me to continue what I feel is important work as a member of the community. We need oversight from the very people whose taxes and donations go towards these agencies programs.

2) As mentioned above, I possess the experience, but also am analytical and question numbers. I feel like I’ve asked legitimate questions to the Non-Profits over the last funding cycles, in a respectful fashion.

3) I am comfortable helping in any of the priority goal areas, however my current job in finance would cause me to be most effective in the area of promoting financial and residential stability. I look at Company’s Balance Sheets, Profits and Loss statements, Tax Returns, Credit Files, so I can comprehend the bottom-line.
1. **What interests you about serving as a Community Investment Partnership volunteer?**
   I value a process that brings interested, smart people together to make tough funding decisions.

2. **What skills or expertise do you bring to a funding panel?**
   I have participated in funding committees for county housing funding for the past two years, before that I participated in a statewide process. I have worked in social services for over 20 years and have had to manage grant processes and manage program and department budgets.

3. **Which of the three priority goal areas below interest you the most and why?**
   Professionally, I am more experienced in **promoting financial and residential stability**. Personally, I am very interested in **preparing children and youth to be resilient, to learn and to succeed**, but have no experience with promoting that work with public or private funding.
What interests you about serving as a Community Investment Partnership volunteer?
I would be honored to serve as a Community Investment Partnership volunteer. This seems to be a great opportunity for me to learn more about my community as well as to be part of your collaborative effort to improve the lives of local residents.

What skills or expertise do you bring to a funding panel?
I moved to Olympia in 1999 when I was appointed by Governor Gary Locke as executive director of the Washington State Arts Commission, a job I was proud to hold for more than 15 years. In that role I managed numerous grant programs and served on grant panels (state, local and national) to distribute public funds to arts organizations, partnerships, education efforts, and other initiatives. I tracked the results for ongoing service improvements, documented and described impacts, developed performance measures. I staffed meetings when panel recommendations were presented for approval by a board of commissioners; presented reports to recipients, Legislators, and colleagues. I have written many grants to Federal agencies, private foundations, corporations, small businesses, and Tribes. In other words: I've worked with grant making from various perspectives and in various roles, and can focus on the applications submitted, the guidelines and requirements, and my role in the panel process.

I stepped down from that job in March 2014 and am now enjoying some new activities - including serving as a Reading Buddy, as vice chair of the Olympia Artspace Alliance, and as a volunteer for the 2015 Homeless Census. I love getting to know my community in new ways, though I'm not wanting any additional board responsibilities at this time. This short term, high impact role of a Community Investment Partnership volunteer seems like a great opportunity and a good fit for my experience and interests.

Which of the three priority goal areas below interest you the most and why?
I am most interested in two of the three goal areas:
Preparing children and youth to be resilient, to learn and to succeed - I have a life-long interest in children and youth, including various roles as substitute teacher, camp counselor, parent/grandparent/auntie Kris.

Promoting health and healthy behaviors - I have a commitment to healthy lifestyles and an eagerness to know more about the programs and services available in our community.