

BLUEPRINTS FOR BELONGING: PINAL COUNTY COALITION TO END HOMELESSNESS 2026 REENTRY ROUNDTABLE

January 20, 2026 – San Tan Valley, AZ



OPENING & OVERVIEW

Participants were welcomed by Arizona State Representative Teresa Martinez who shared her passion and commitment for the effort.

Participants were also welcomed by Cinda Thorne, the Chair of the Pinal County Coalition to End Homelessness.

Cinda thanked the many dedicated partners, leaders, community advocates, and service providers gathered who are committed to supporting successful reentry across Pinal County.

She provided an overview of the day and its focus building capacity in rural communities. Rural regions like Pinal County face unique challenges when it comes to housing availability, transportation, service access, and coordinated reentry support. Limited resources paired with large geographic coverage areas can make returning to the community after incarceration especially difficult for individuals and families.

Yet, rural communities also possess powerful strengths: close-knit networks, innovative local leaders, and a shared willingness to collaborate. The goal for the gathering is to tap into those strengths, deepen our partnerships, and identify sustainable strategies that expand housing options and support systems for those transitioning back into our communities.

Reentry doesn't start at release. It starts with preparation, coordination, and the assurance that each person has a safe, stable place to call home. Housing is the foundation of successful reentry—the platform that allows individuals to pursue employment, engage in treatment or recovery, reconnect with family, and rebuild their lives with dignity.

Participants will advance the health and stability of rural communities through sharing knowledge, identifying gaps, creating opportunities, and working together to build a stronger, more coordinated response that create pathways home that support stability, dignity, and hope for all.

SETTING THE STAGE: PANEL DISCUSSION ON BUILDING CAPACITY

Tara Jackson, President of Arizona Town Hall facilitated a panel discussion that helped to set the stage for the roundtable activities on building capacity with the following panelists:

- Gabriel Jaramillo, Director of Healthy Communities, Vitalyst Health Foundation
- Andrew Witzel, Rural Program Manager, Local First Arizona
- Rose Snyder, CEO, Rose Snyder Consulting

Funding and building capacity are critical for the success of all efforts around reentry. The panel provided insight and available resources for organizations to be prepared before completing or submitting grants. Organizations were encouraged to have governance structures in place and to have commonly requested documents ready to be uploaded.

Great grant applications are careful to respond to the requirements of the grant, provide detail, and “show instead of tell” what the problem is and what efforts can create measurable results.

There are many changes occurring within the funding landscape and it can be challenging to build and maintain capacity for successful programs. Grants are essential to meeting capacity needs for programming and impact. The panel discussed helpful resources for locating meaningful opportunities as well as resources that help organizations submit a successful grant application.

Resources discussed and provided by the panel are listed below:

- <https://azimpact.org>
- <https://cfsaz.org>
- <https://www.azimpactforgood.org>
- <https://grantstconsulting.com>
- <https://www.rosesnyderconsulting.com>
- <https://localfirstaz.com/economic-resource-center>
- <https://www.vitalysthealth.org/>
- [Housing - Vitalyst Health](#)
- [Partnering With Vitalyst - Vitalyst Health](#)
- [About - TAP AZ](#)
- Arizona Community Foundation- [Our Strategic Plan](#)
- [Home Matters to Arizona](#)
- [Home Matters to Arizona Portfolio of Funds — Home Matters to Arizona](#)
- [Home - AZ Impact For Good](#)

ROUNDTABLE EXERCISES: GROUP PROJECTS AND PLANS

Joseph Caruso from United Way of Pinal County and Jan Miller, a volunteer for Arizona Town Hall, provided participants with different forms to help identify grant projects and develop strategies for creating a successful grant application. These resources are provided in the appendix and will help groups identify area needs and successfully apply for grants to fund projects.

Participants worked at their tables to complete potential grant submissions and shared their project ideas with the entire room. Some also shared their completed forms which are included in this report.

The Roundtable Exercise allowed participants to identify successful strategies for grant applications and surfaced important issues to consider for subsequent Roundtables and for considerations for action steps and strategic planning.

Housing rose to the top as a critical topic to address in future gatherings as lack of housing is directly related to high rates of recidivism. We need to address all types of housing: transitional, emergency, and permanent. While the cost of housing is one of the major challenges for successful reentry, a record of convictions and poor credit also limit housing opportunities.

Solutions could include providing opportunities for transportation and childcare that increase housing choices; eliminating barriers that restrict those with convictions from accessing housing options; and subsidizing the cost of housing.

Community collaboration and coordination that helps provide these options is essential. How best to work together to overcome obstacles and expand housing opportunities could be the focus for additional Roundtables and should be included in strategic planning. It would also be beneficial to showcase what works well: for example, housing success stories or programs, such as Yavapai County's Community Coach program. Reentry simulations and presentations from the county attorney also help to identify solutions.

Relevant local resources include the Pinal County Housing Plan <https://www.pinal.gov/1779/Pinal-County-Housing-Plan> and the MAG marketing toolkit <https://homeiswhereitallstarts.org/>.

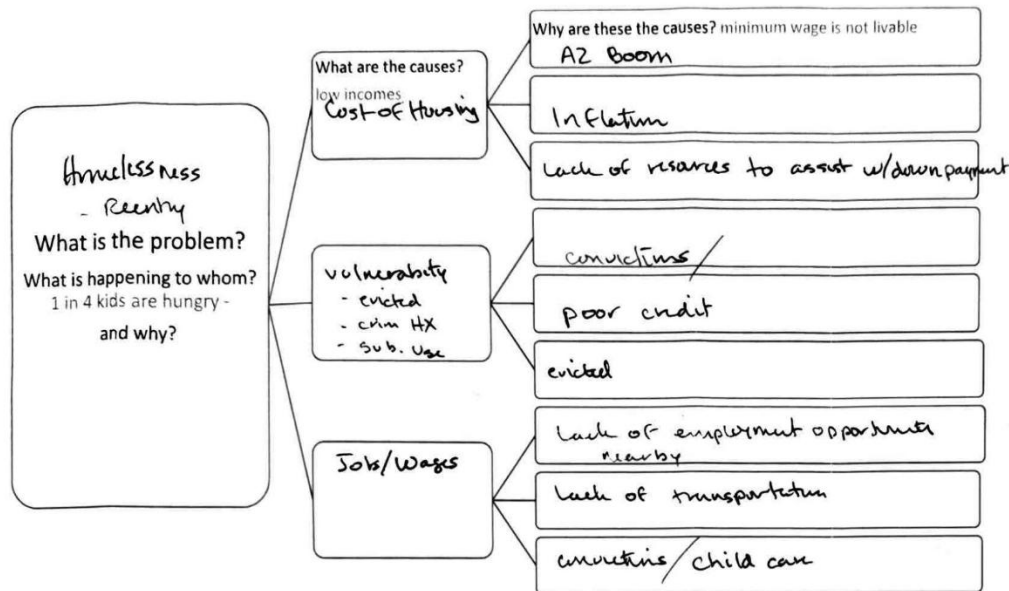
CLOSING

Cinda Thorne thanked participants for bringing their passion and expertise to build solutions together for rural Arizona.

The conversations participants shared made one thing very clear: we have everything we need to build capacity and to create real change—commitment, collaboration, and belief in the potential of every person returning home.

“Resilience is the quiet strength that rises each time life asks us to begin again.”

PARTICIPANT WORKSHEETS



Grant: _____

Due Date: _____

What is the need? What is the gap that exists? What will happen if the problem is not addressed? Why do we need the money to solve the problem?

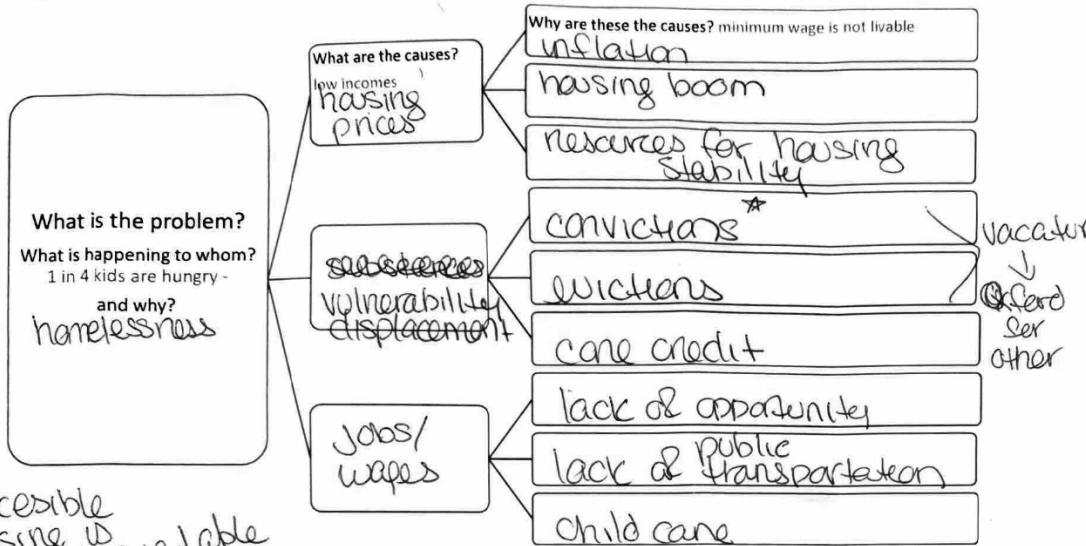
All four elementary schools in AJ are Title I schools. There are 12,000 children. If children are not fed during the summer they may become sick, they may be out on the streets looking for food, this may reduce the likelihood of summer learning...

What is the solution? What can we realistically do? Write one sentence which covers the who, what, when, where, why and how.

The group in AJ will collect PB&J to feed hungry AJ school children during the summer.

Why is this happening?	Methods				Results	
	Approach <small>What are we going to do to reach our goal?</small>	Inputs (resources) <small>What resources are we going to provide?</small>	Activities (Throughputs) <small>What are we going to do with the inputs to fulfill the mission? e.g. offer classes etc.</small>	Outputs (Raw Numbers) <small>A direct product of the activities e.g. total number of classes</small>	Outcomes (measurable) <small>A specific benefit or change as a result of the project e.g. decrease in...</small>	Goals (Impact - long term) <small>An overall goal for the department - statement of what we want to accomplish, a desired result, ultimate impact.</small>
School is out Lack of affordable accessible housing	Campaign to collect PB&J Purchase homes & follow an Oxford House Model for J11	Leverage local partners - Job training - Financial Ed - Life Skills - Dew. Emp. Partnership - Cog - Peer Support	Drop off sites	Collect 300 jars Stable housing for 50 people	Feed 100 kids Productive, healthy person - impacts families - Contributing to society Decrease in malnutrition	Reduce summer hunger
SMART Objective <small>How will we achieve the goal?</small>	Direction of Change <small>Increase, decrease, enhance, expand, reduce (direction or action word)</small>	What are we trying to change?	Target Population	Degree of Change	Timeframe	Measurement <small>How are you measuring this? As evidenced by...</small>
Objective 1	decrease	hunger	school aged children	provide 4 jars, 50 sandwiches/meals, there are 200 meals/summer = 25%	during summer 2018	number of jars distributed
Objective 2						
Objective 3						

Santitas Leads



Grant: _____

Due Date: _____

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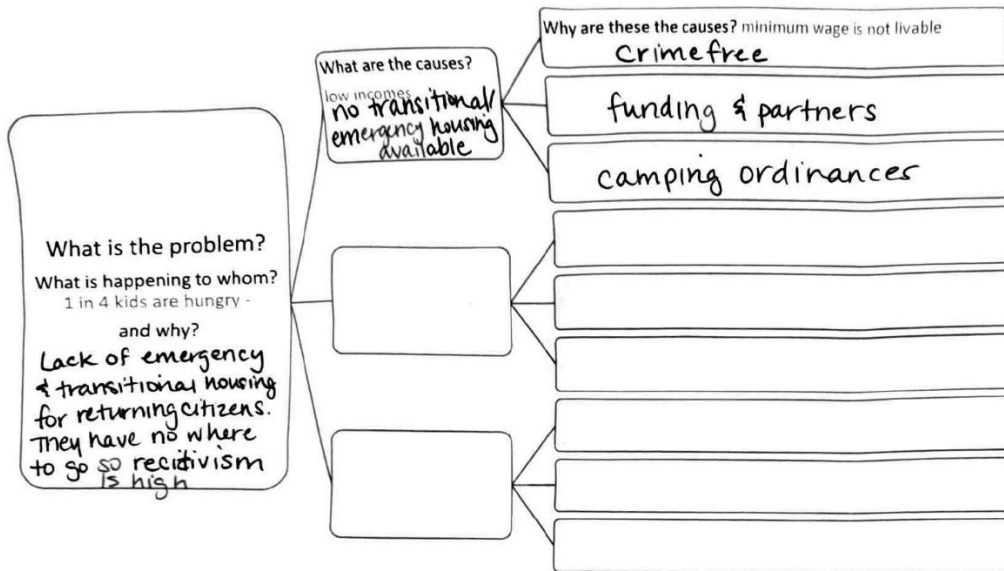
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What is the solution? What can we realistically do? Write one sentence which covers the who, what, when, where, why and how.

The group in AJ will collect PB&J to feed hungry AJ school children during the summer.

Why is this happening?	Methods				Results	
	Approach What are we going to do to reach our goal?	Inputs (resources) What resources are we going to provide?	Activities (Throughputs) What are we going to do with the inputs to fulfill the mission? e.g. offer classes etc.	Outputs (Raw Numbers) A direct product of the activities e.g. total number of classes	Outcomes (measurable) A specific benefit or change as a result of the project e.g. decrease in...	Goals (impact - long term) An overall goal for the department - statement of what we want to accomplish, a desired result, ultimate impact.
School is out \nearrow	Campaign to collect PB&J	Leverage local partners	Drop off sites	Collect 300 jars	Feed 100 kids	Reduce summer hunger
	community development	employment partnerships	coordinate community resources	peer support / sponsor	stable houses for 50 productive more tax income	

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What is the solution? What can we realistically do? Write one sentence which covers the who, what, when, where, why and how.

Non-profit A will secure a location in Community B for a safe-camping space for returning citizens without safe housing by 2027 by purchasing land.

Why is this happening?	Methods				Results	
	Approach What are we going to do to reach our goal?	Inputs (resources) What resources are we going to provide?	Activities (Throughputs) What are we going to do with the inputs to fulfill the mission? e.g. offer classes etc.	Outputs (Raw Numbers) A direct product of the activities e.g. total number of classes	Outcomes (measurable) A specific benefit or change as a result of the project e.g. decrease in...	Goals (Impact - long term) An overall goal for the department - statement of what we want to accomplish, a desired result, ultimate impact.
School is out	Campaign to collect PB&J Community forums identify funding for future phases	work with local government/zoning/realtors HMIS/Dept. of Corrections Punitive team City of Phx (for model)	Donor sites identify land for purchase & zoning visit/information gathering	Collect 300 jars	Feed 100 kids	Reduce summer hunger

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Proposal Conceptualization Worksheet

Understand the Problem	Brainstorm Solutions	Identify Solutions	Indicate Expected Results & Benefits	Tasks to Accomplish Solution
<p>Cycle of Re-entry</p>	<ul style="list-style-type: none"> - make classes prior to release mandatory - Checklist - community partnership holistic 	<p>Partnerships</p> <p>pre reentry preparation & peer support</p>	<ul style="list-style-type: none"> - confident well rounded individual - trust entities - find reentry and success - keeps them as successful part of the community 	<ul style="list-style-type: none"> - funding & - well trained resources - peer system - workforce connections - housing connections.

Resources Needed		Reassess		Outcome Measures
Personnel	Non-Personnel	Solutions	Results/Benefits	
<ul style="list-style-type: none"> • Contact person from each partnership • to provide classes & resources 	Peers.	<p>pre-entry prep & re entry peer support</p>	<ul style="list-style-type: none"> - prepared and guided re entry - connection w/ someone who has successfully reentered and stayed successful 	<ul style="list-style-type: none"> - Survey - Success stories

Proposal Conceptualization Worksheet

Understand the Problem	Brainstorm Solutions	Identify Solutions	Indicate Expected Results & Benefits	Tasks to Accomplish Solution
Homelessness NO Shelters	Change legislature Grants funding Outreach	Grant Approval Build Shelter Outreach team In house CM	Immediate shelter short term + Longterm program based housing to independent housing	Lobby Grant Build Employ

Resources Needed		Reassess		Outcome Measures
Non Personnel	Non -Personnel	Solutions	Results/Benefits	
CATS Clothing hygiene Security food Funding Facilities/Utilities	Board-staff CM, Director Grant Writer IRA Partnerships	Shelters food low income housing.	less strain on DOJ, law enforcement. Crime reduction reduced homelessness	Surveys of homeless population. wrap around service

APPENDIX

Roundtable Agenda

Speaker Biographies

Comprehensive Grant Resources Handout

Community Foundation for Southern Arizona Capacity Building Workshop Flier

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REENTRY ROUNDTABLE

Planning Reentry Housing *Solutions.*



arizona
complete health.



UNITED WAY
Pinal County



mercy care



PINAL COUNTY
COALITION TO
END HOMELESSNESS



mercy care
advantage
HMO SNP



PINAL COUNTY

Planning Reentry Housing *Solutions.*

Agenda

8:30 am - 9:00 am - **Registration**

9:00 am - 9:15 am - **Opening Remarks**

AZ State Representative-Teresa Martinez

Cinda Thorne-Molina Health Care

9:15 am - 10:30 am - **Panel Discussion**

Rose Snyder - Center for Healthy Nonprofits

Andrew Witzel-Local First Arizona

Gabriel Jaramillo-Vitalyst Health Community

Moderator Tara Jackson-Arizona Town Hall

10:30 am - 10:45 am - **Break**

10:45 am - 12:00 pm - **Funding Simulation**

Joseph Caruso-United Way of Pinal County

12:00 pm - 1:00 pm - **Lunch**

Provided by Mt. Athos

Table Talks and Networking

1:00 pm - 1:15 pm - **Closing / Final Remarks**



PINAL COUNTY COALITION TO END HOMELESSNESS



SPEAKER BIOGRAPHIES

FACILITATORS

Jan Miller

Jan Miller is a creative problem solver, adept at recognizing, clarifying and communicating key ideas and issues. She is a graduate of the Global Leadership Certificate Program at the American Graduate School of International Management (Thunderbird) and has a Bachelor of Science degree in Mechanical Engineering from Cal Poly State University at San Luis Obispo and a Bachelor of Arts degree in Government from Pomona College. Her diverse educational background served her well during her 30 years in the power industry and enabled her to be something of a “corporate interpreter” — someone who understood principles and vernacular of engineering, business and policy and could help others in these groups work more effectively together. Jan retired from SRP in 2015 after 28 years of service. She has been active in a variety of community activities for many years and currently volunteers with Arizona Town Hall and The Heirloom Collective. She is married to Ron Libby and enjoys spending time with family and friends, especially Ron's adult children and grandkids. She and Ron both love to kayak, hike, camp, travel, cook (and eat) healthy food, and to learn and experience new things.

Tara Jackson

Tara Jackson has served as president of Arizona Town Hall since July of 2006. In this role, she oversees all aspects of managing a statewide nonprofit with a mission of bringing diverse and often opposing parties together to solve the most complex and challenging issues facing the state. Prior to joining the staff of Arizona Town Hall, Tara practiced commercial litigation for 16 years with a Phoenix-based law firm. She has vast experience in helping communities to address issues that intersect with policy and government systems. In addition to her law practice, Tara taught as an adjunct professor for ASU's Law School and has been a visiting lecturer for ASU and the University of Arizona. She has served in leadership and advisory roles with bar associations, courts, government systems, nonprofits, and educational organizations. She holds both her undergraduate degree in Biology and her law degree from Indiana University. Tara is also a certified yoga, barre and mindfulness teacher and holds various certifications through the National Academy of Sports Medicine. She and her husband have five grown children.

Joseph Caruso

Joseph Caruso serves as the Director of Development and Community Engagement for United Way of Pinal County, bringing nearly two decades of deep roots and commitment to the community. A resident of Pinal County for 18 years, Joseph has been actively involved with United Way of Pinal County for more than 15 years and has proudly served as a staff member for the past five years. He is the co-chair of the Pinal County Wellness Alliance and the chair of Pinal Partnership's Health and Human Services Committee, working closely with partners to strengthen systems that support healthy, thriving families. Joseph is passionate about making Pinal County a place where everyone can reach their full potential, and he is dedicated to building partnerships that create lasting, positive change across the community.

PANELISTS

Gabriel Jaramillo

Gabriel Jaramillo serves as Director of Healthy Communities, working with community partners and decision-makers to address housing needs across Arizona by supporting community health through design. He has more than 15 years of experience in affordable housing, including financing, community development, and housing policy. Gabriel serves as Chair of the Board of Directors for the Arizona Housing Coalition, is a member of the City of Phoenix's Planning Commission, and participates in the Governor's Interagency and Community Council on Housing and Homelessness. He previously served as Director of Community Development and Government Relations at Habitat for Humanity of Central Arizona. Gabriel holds a BA in History and Public History from Grand Canyon University and is a Flinn-Brown Fellow and Valley Leadership Alumni.

Andrew Witzel

Andrew Witzel is a Rural Program Manager focused on workforce development for Local First Arizona. With over 15 years of public service experience, he has worked with veterans, individuals experiencing homelessness, and people exiting incarceration. An Arizona native from Mohave County, Andrew is committed to strengthening rural communities across the state by applying his deep experience in workforce development and public service to support collaborative economic environments.

Rose Snyder

Rose Snyder is dedicated to helping people and organizations thrive. She holds a Master's in Organizational Management and a Bachelor's in Education, combining academic grounding with decades of leadership experience. Rose is certified by BoardSource as a Nonprofit Governance Consultant and is one of a small number of practitioners worldwide trained in Psycho-geometrics® (Shapes) communication. She is a certified leadership coach through the International Coaching Federation and holds additional certifications in Emotional Intelligence, Positive Intelligence, and Organizational Culture Coaching from The Maslow Research Center. She is also completing certification in Systems Thinking facilitation through the Waters Center. Rose has inspired nonprofit leaders nationwide and delivered culture and team-building programs to global corporations. She has extensive leadership experience in Olympic sports, including USA Swimming, U.S. Figure Skating, and the U.S. Olympic & Paralympic Committee. Her work centers on team building, communication, culture transformation, and leadership coaching, with Psycho-geometrics® as a cornerstone methodology. Rose lives in Tucson with her husband, Charlie, is a proud University of Arizona graduate, and has three adult children. They love exploring new places together.

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REENTRY ROUNDTABLE

Planning Reentry Housing *Solutions.*



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UNITED WAY
Pinal County



mercy care



PINAL COUNTY
COALITION TO
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mercy care
advantage
HMO SNP

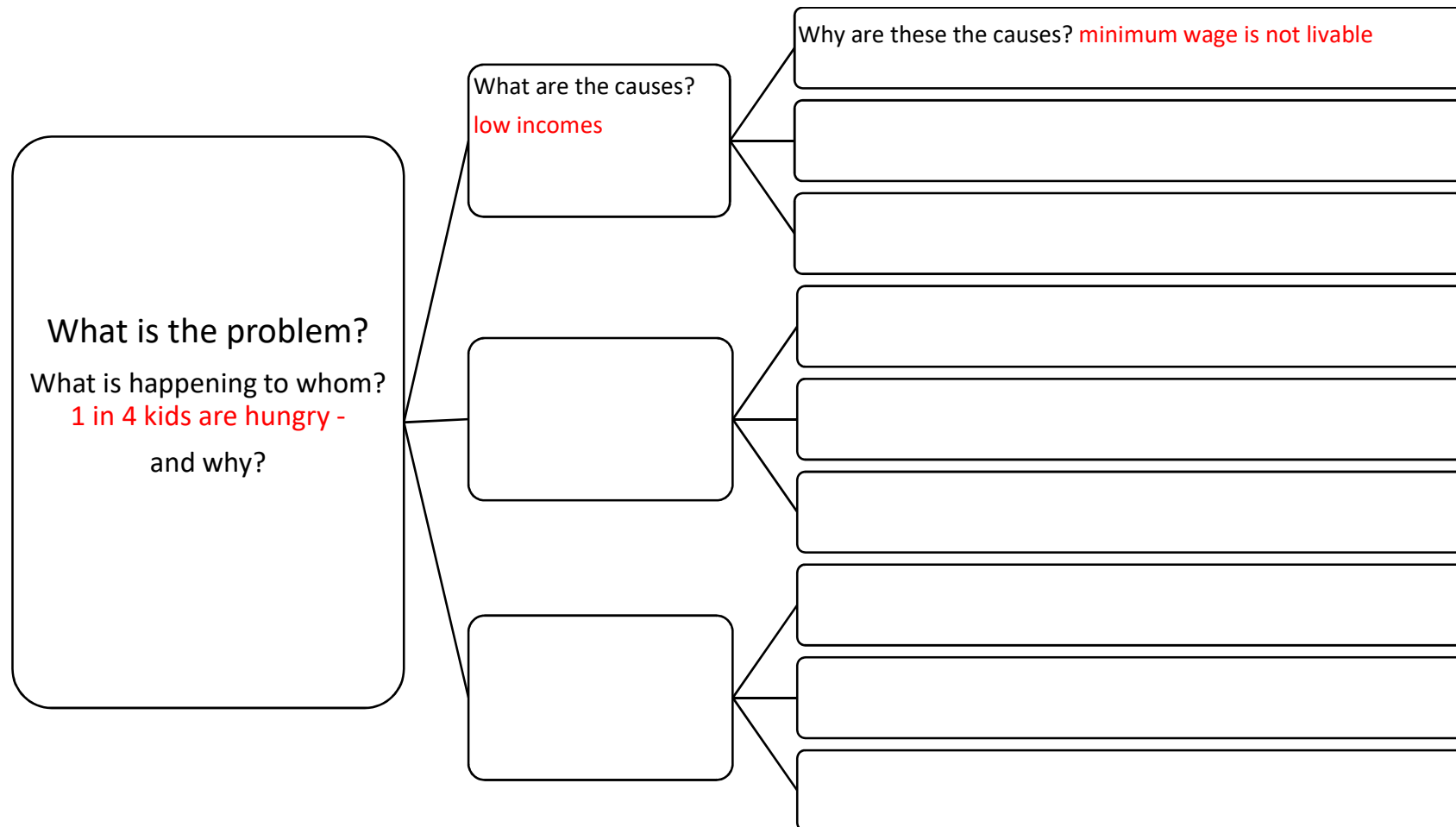


PINAL COUNTY

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Objective 3						

Additional Resources
And
Speaker Bios

Funding Simulation Worksheet

Instructions: You have a total budget of \$5,000,000 to allocate across the following housing reentry strategies. For each strategy, write down your allocated amount and a brief justification for your decision. Be sure to have a plan for sustainability.

Strategy	Suggested Range	Your Allocation
Transitional Housing	\$500K–\$1.5M	_____
Permanent Supportive Housing	\$1M–\$2M	_____
Rental Assistance/Vouchers	\$500K–\$1.5M	_____
Reentry Navigation Services	\$250K–\$750K	_____
Capital Development	\$1M–\$2M	_____
Peer Support & Staffing	\$100K–\$500K	_____
Data & Evaluation	\$100K–\$300K	_____

Justifications

Transitional Housing:

Permanent Supportive Housing:

Rental Assistance/Vouchers:

Reentry Navigation Services:

Capital Development:

Peer Support & Lived Experience Staffing:

Data & Evaluation:

Housing:

Reentry:

Employment:

Other:

Program Evaluation

This is often the place that grant writers find most difficult. Often, grant writers do not spend enough time articulating the evaluation section, particularly for state and federal grants. This may be that grant writers believe that they may not have enough experience in evaluation. Evaluation should be planned carefully. It should reflect 10-15% of the proposed budget for state and federal grants. If you do not have the expertise, then add it to your budget. For example, add a consultant who can conduct an evaluation or seek information from others. Program evaluation is so important. In the grant proposal, the writer is now describing to the funding agency how the program measures the wonderful program activities that are addressed in the proposal. Most grant/proposal writers do not spend enough time thinking about this section. Consider carefully how and exactly the way that success can be determined.

For example, if you state in the objectives that a decrease will occur, how will this be measured.

Evaluation can be conducted in two ways or a combination of both.

- Process or Formative Evaluation. The evaluation monitors the progress of the grant from the beginning to the end. It is concerned whether the project is on the correct track and are the services delivered. The data tends to be more qualitative with such items as, newspapers articles, public speaking appearances. Other collection techniques can be attendance records, items that are used in a class or workshop to demonstrate learning.

- Outcome or Summative Evaluation. Outcome or product evaluation measures impact. Impact is measured in various ways, such as surveys, interviews, tests, etc. To increase the strength of the evaluation, research designs (pre-post design) are designed so statistical significance can be demonstrated regarding impact.

Does it clearly include the following:

- Presents a clear plan for evaluating achievement of outcome objectives.
- States what will be measured
- States method of collecting data
- Describes any testing instruments to be used
- States who will do the evaluation
- Shows how evaluation will be used for program improvements

Long Island Teenage Pregnancy Prevention Program goals:

Goal 1: Provide a curriculum-based program (*Reducing the Risk*) to educate high risk Long Island high school-age students about topics such as responsible behavior, relationships, and pregnancy prevention.

SMART Objective 1a: By the end of Year 1, implement the program in 100% of the 8 sites identified as in need of teenage pregnancy prevention strategies.

SMART Objective 1b: Annually thereafter, continue to implement the program in 100% of the 8 sites identified as in need of teenage pregnancy prevention strategies.

SMART Objective 1c: Annually, reduce the number of sexually inexperienced teenagers enrolled in the program who engage in unprotected sex by [redacted] % or more.

SMART Objective 1d: Annually, increase the number of teenagers enrolled in the program who demonstrate use of refusal skills and delaying tactics by [redacted] % or more.

SMART Objective 1e: Annually, increase the number of teenagers enrolled in the program who are aware of how to prevent HIV and other STDs by [redacted] % or more.

SMART Objective 1f: Annually, decrease baseline risk factors of teenagers enrolled in the program by [redacted] % or more.

Inputs	Strategies	Activities	Outputs	Outcomes		
Resources and Constraints	Funding Mission Fulfillment	Process Objectives	Accountability Milestones	Short-term (1 Year)	Intermediate (3 Years)	Long-Term (5 Years)
Resources dedicated to or consumed by the program <ul style="list-style-type: none"> • money • volunteers and volunteer time • facilities • equipment and supplies Constraints on the program <ul style="list-style-type: none"> • partner cooperation • parent reluctance • funders' requirements 	<i>Reducing the Risk</i> model orientation and implementation in eight Nassau and Suffolk County high schools based in community with significantly high risk indicators related to teenage pregnancy.	-Orient sites and site personnel. -Obtain parent permission. -Provide two 16-week cycles of classroom lessons during out-of-school time four afternoons weekly each semester. -Monitor and evaluate.	# of parents signing permission for student enrollment into the program. # of students enrolled. # of Hispanic student enrolled and participating. # of students attending regularly. #of students completing 16 lessons. # of students demonstrating reduced risk factors.	<u>Individual protective factors:</u> -Decreased unprotected sex. -Increased refusal skills. -Increased HIV and STD prevention awareness. -Decreased baseline risk factors (identified in intake case management process).	<u>Peer-driven protective factors:</u> -Increased number of students trained at <i>hot spot</i> high schools. -Increased refusal skills and alternative behaviors to remain abstinent. -Increased high school-wide message of teenage pregnancy prevention lessons learned	-Lifelong change in knowledge, beliefs and values related to responsible behavior, relationships, and pregnancy prevention.

Goal 2: Incorporate innovative risk factor reduction components into the out-of-school time prevention model to support participant retention in program services.

SMART Objective 2a: Annually, provide one-on-one individual and family counseling services to 100% of teenagers enrolled in the program and their families/caregivers.

SMART Objective 2b: Annually, provide health referrals for 100% of teenagers enrolled in the program.

SMART Objective 2c: Annually, connect 100% of 9th and 10th graders enrolled in the program with age-appropriate supervised small group service learning activities in their local communities.

SMART Objective 2d: Annually, connect 100% of 11th and 12th graders enrolled in the program with age-appropriate individual service learning activities in their local communities.

SMART Objective 2e: Annually, provide peer-age, elder, and staff tutoring support for 100% of teenagers enrolled in the program.

Inputs	Strategies	Activities	Outputs	Outcomes		
Resources and Constraints	Funding Mission Fulfillment	Process Objectives	Accountability Milestones	Short-term (1 Year)	Intermediate (3 Years)	Long-Term (5 Years)
Resources dedicated to or consumed by the program <ul style="list-style-type: none"> • money • staff and staff time • volunteers and volunteer time • facilities • equipment and supplies Constraints on the program <ul style="list-style-type: none"> • partner cooperation • parent reluctance • funders' requirements 	Individual counseling services. Family counseling services. Referrals to health care providers. Individual service learning opportunities. Small group service learning opportunities. Out-of-school time tutoring support.	-Intake, Risk assessment. -Case management plan (parent, teen, and social worker). -Providing information and referrals to service providers. -Identify career interests and match students to individual and small group service learning sites and projects.	# of students counseled. # of families counseled. #of referrals to health care providers. #number of follow-ups to assure student received services. # of 11 th & 12 th graders assigned to individual service learning opportunities. # of 9 th & 10 th graders assigned to small group service learning opportunities.	<u>Individual protective factors:</u> -Increased school connectedness. -Increased program staff connectedness. -Increased family connectedness. -Increased community connectedness.	<u>Peer-driven protective factors:</u> -Increased positive peer connectedness. -Increased ability to realize benefits for connecting with positive peers versus negative peers.	-Lifelong change in knowledge, beliefs and values related to responsible behavior, relationships, and pregnancy prevention.

Goal 3: Maintain fidelity in the selected model by requiring program staff to complete national training in model implementation.

SMART Objective 3a: By the end of Year 1, implement 100% of the RTR model as designed with no modifications in the 8 selected high school sites across Long Island.

SMART Objective 3b: Annually thereafter, 100% of the implemented model will be evaluated for delivery design fidelity.

Inputs	Strategies	Activities	Outputs	Outcomes		
Resources and Constraints	Funding Mission Fulfillment	Process Objectives	Accountability Milestones	Short-term (1 Year)	Intermediate (3 Years)	Long-Term (5 Years)
Resources dedicated to or consumed by the program <ul style="list-style-type: none"> • money • staff and staff time • volunteers and volunteer time • facilities • equipment and supplies Constraints on the program <ul style="list-style-type: none"> • delay in staff hiring process • human resources regulations • funders' requirements • Associates training cycles 	<i>Reducing the Risk</i> model staff training component.	<ul style="list-style-type: none"> -Recruit, screen, and hire staff. -Orient to program purpose. -Subcontract with ETR Associates for two-day training program. -Purchase curriculum models for staff to bring back for program use. -Monthly staff program fidelity meetings. -Ongoing monitoring and evaluation of program's implementation. 	<ul style="list-style-type: none"> # of staff assigned to program. # of staff completing program purpose orientation. # of staff registered for training. # of staff attending training. # of staff completing training. # of staff able to retain fidelity of model implementation. # of correct actions implemented related to preserving fidelity of program model. 	<ul style="list-style-type: none"> -Increased levels of excellence in evidence-based curricula training and implementation. 	<ul style="list-style-type: none"> -Increased effectiveness to facilitate the evidence-based curriculum with the youth they serve. -Increased ability to apply the "smart adaptation" guidelines for tailoring the curriculum to the needs of their youth while maintaining curriculum fidelity. -Increased confidence for training/ preparing others to facilitate the evidence-based curricula. 	<ul style="list-style-type: none"> -Program staff is able to embed lifelong change in students in the areas of: knowledge, beliefs and values related to responsible behavior, relationships, and pregnancy prevention.

Goal 4: Collaborate with existing and new Long Island partners to leverage existing public and private sector monies already designated for teenage pregnancy prevention efforts.

SMART Objective 4a: By the end of Year 1, increase the number of Building For Success Partnership members who are Suffolk County service providers by 25% or more.

SMART Objective 4b: Annually, thereafter, increase the number of Building For Success Partnership members who are Suffolk County service providers by 10% or more.

Inputs	Strategies	Activities	Outputs	Outcomes		
Resources and Constraints	Funding Mission Fulfillment	Process Objectives	Accountability Milestones	Short-term (1 Year)	Intermediate (3 Years)	Long-Term (5 Years)
Resources dedicated to or consumed by the program <ul style="list-style-type: none"> • money • staff and staff time • volunteers and volunteer time • facilities • equipment and supplies Constraints on the program <ul style="list-style-type: none"> • partner cooperation • local politics • funders' requirements 	<i>Reducing the Risk</i> model awareness and support Long Island-Wide.	Identify additional Suffolk County youth-serving service providers to join the Building for Success Partnership. Monthly Partnership meetings.	# of agencies aware of Partnership. # of agencies expressing interest in joining Partnership. # of agencies joining Partnership. # of agencies attending monthly Partnership meetings. # of agencies retained and engaged annually in Partnership's initiatives.	-Increased awareness of youth-serving service providers in both counties of the importance of leveraging and continuing the social marketing campaign to reduce teen pregnancies.	-Increased grant seeking collaborations. -Increased sharing of incoming funding through higher levels of contracted services to youth-serving providers. -Increased monetary resources are drawn to Long Island communities to prevent teenage pregnancies.	Bi-county community partners are able to see their impact on youth in the areas of: knowledge, beliefs and values related to responsible behavior, relationships, and pregnancy prevention.

How to Write a Comprehensive Case Statement For a Non-Profit Organization Developed By: Strategy Plus/Jerry O. Roberg

A Case statement is the first document that you will need to develop for your non-profit strategy. It is the single most important document because all other marketing and ministry documentation will be developed around your Case Statement. Developing a strong Case Statement is the spring-board in all other development activities.

Most Frequently ask Questions:

1. What is a Case Statement?

A Case statement is a Dynamic Document that:

- Includes your Statement of Purpose, Vision Statement, and Mission Statement.
- Documents a comprehensive needs assessment of your local community.
- States clearly, whom you want to help.
- Constructs a clear and decisive argument for the need of your services and defines how you will do what you do best.
- Documents how long you've been in existence.
- Documents how you will change and impact the identified needs you assessed in your local community.
- States how your organization will make a difference in the community you serve. (How will you change lives?)
- Includes documentation of the demographics of the population you intend to serve.
 - A. Who are they?
 - B. Where do they live?
 - C. How did they get into their present situation?
 - D. What is the segmented of population?

2. What is the purpose of a Case Statement?

A Case Statement is a living document that you must have on file at all times. It is important for your Board of Directors and your Donor Development Department to understand, who you are and what you intend to do to make a difference in your community. A case statement is essential to the future success of the organization in raising major funds. This document is crucial for any other proposals that might be written in the future, such as grants to Foundations or proposals to churches or corporations.

3. How will it help our cause?

Those from whom you request large sums of money will demand to know that you have done your homework. Foundations require this information as well as other government agencies. When you approach a church or a private corporation, they will need to have access to the information contained in a well-documented Case Statement.

4. To whom should I provide a Case Statement?

Give it only to those who request it. This document, when completed, should fill a notebook. It would be expensive to reproduce. Your Board of Directors should have a

copy; however your President, CEO and Donor Development Department must also have this document close at hand.

5. What do I do first?

First, make sure that your organization has a comprehensive yet simply stated " *Statement of Purpose* ". This statement needs to clearly define what your organization is all about. It should be short and concise.

6. How often should I rewrite my Case Statement?

At least once a year? or whenever your vision changes or evolves. This document can be filed on your computer so you can make copies as needed. Make sure that your have a copy backed up on a disk somewhere.

COMPILING A COMPREHENSIVE CASE STATEMENT

PART ONE

- I. Maps of the County showing all major Cities you serve.
- II. Demographic data population, and local large companies.
(Chamber of Commerce)
 - A. Wealth ratings within certain demographic areas in your Community.
 - B. Housing Costs.
- III. List all County and Government Agencies that currently serve in your Community.
 - A. Names of other non-profit organization that serve in your community. Names address and phone numbers.
 - B. Define their interaction with your organization.
 - C. Insert a list of Churches that serve in the community and describe their function and community involvement.
- IV. List of City and County officials "Mayor, City Counsel Members, County supervisor, with name, address, telephone, FAX numbers and e-mail address.
- V. List of United States Congressmen and House of Representatives with name, address, telephone, FAX numbers and e-mail address.

PART TWO

- I. Statement of Purpose
- II. Slogan
- III. Strategic Vision Statement
- IV. Mission Statement "Your Objective".
- V. Research and Needs Assessment
- VI. Beginning the Proposal
 - Show a clear and concise Vision of your organization
 - Explain the community's need.
 - Mention your organization's strengths.
 - Show what your need is in order to fill the need. "Be specific".

Program Outline

- Details, Details, and more Details - Have a clear detailed plan for meeting the needs of those you serve.

Evaluation

- Who will evaluate the program?
- What criteria will be used?

- During what time frame will the program evaluation take place?

Needs

- What does the community need?
- How can your program fill that need?
- What do you need in order to fill the community's need?

Research

Find a "Funder" with the same or similar vision.

- Research the funding source.
- Request Guidelines.
- Make phone contact if allowed to clarify their current objectives.

Collaboration

Include letters from collaborating organizations stating:

- What you do for them
- What they do for you

Pictures

A picture is worth a thousand words.

Document Financial Stability

- IRS 501 (c) (3) Determination.
- Tax returns filed.
- Audited if budget is over \$350,000.
- Verified by two officers if budget is over \$350,000.
- Copy of your current yearly projected budget.
- List of funds received/requested from other sources.

Show Community Support

Letters of endorsement:

- Letters from other non-profit agencies.
- Letters from community leaders.
- Politicians
- Local business people.
- Local Churches.

PART THREE

Draw a Conclusion

Make a one page summary that tells:

- Who you are.
- What you want the donor to do.
- Where will you locate your project.
- When will the project be completed.
- How much do you want the donor to give you.
- Why your project is needed in the community.
- Who will evaluate the project once completed.

CHECKLIST FOR SUCCESS

Collect the following information in multiple copies before it's time for proposal writing and submission. When you receive a Request for Proposals (RFP) on Monday that is due Friday, you can be "grant-ready" and make the deadline!

- ✓ 501 (c) (3) determination letter from the IRS
- ✓ Annual Report
- ✓ Brochures
- ✓ EIN/tax ID #
- ✓ Data UNS # and National Information Management System (NIMS) registration
- ✓ Evaluation/outcomes/performance measures
- ✓ Future funding statement for continuation funding (including list of pending proposals and/or awarded grants)
- ✓ History of organization including year established, number and qualifications of staff, programs, mission/philosophy, awards, stories/testimonials, accreditations/certifications
- ✓ Calendar of Events
- ✓ List of Board of Directors/ Trustees members, titles and affiliations, contact information
- ✓ List of officers and contact information
- ✓ List of management and contact information
- ✓ Map of target area
- ✓ Minutes of Board meetings and resolutions for past year
- ✓ Most recent audit
- ✓ Most recent financial statement and 990 Form & state filings
- ✓ Newsletters
- ✓ Current Strategic/Business Plan
- ✓ Organizational structure flow-chart
- ✓ Current project and organization budgets and budget narratives
- ✓ Recent newsletter articles, newspaper clippings, evaluations or reviews
- ✓ Resumes and/or job descriptions of current and/or proposed staff
- ✓ Sample letters of support/commitment & fax cover for letters of support
- ✓ Target population demographics and needs (research-based or evidence-based)
- ✓ Mission statement
- ✓ Certificate of Incorporation
- ✓ Bylaws
- ✓ Logic Models for programs
- ✓ NEW 990 FORM information re: governance and fundraising (effective 5-09; www.irs.gov/eo)
- ✓ WWW.GRANTS.GOV registration for all federal grants

EACH FUNDER'S APPLICATION GUIDELINES NOTE THE FORMAT AND CONTENT.

REMEMBER THE GOLDEN RULE: WHOEVER HAS THE GOLD MAKES THE RULES.

lgb: 11-12-07 revised per AAGP's "Capitalizing as a Consultant"; www.Butler-Consulting.com; 11-04 copyright; and combined with materials from Andrew Grumet, Esq., in "A Toolbox to Answer the Grant-Maker's "Accountability Questions"

CAPACITY BUILDING *Workshop*

If you are looking to enhance your nonprofit board experience and build the capacity of your organization, this workshop is for you.



January 28, 2026
4:00-8:00PM



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