

2022 – 2025 Community Investment Process



United Way Suncoast

Agenda

OVERVIEW

FUNDING PROCESS

FUNDING FOCUS

RESOURCES + Q&A

Questions in the chat throughout the presentation are welcomed and encouraged. Verbal question and answer time will be reserved for the final 15 minutes.

Future and follow up questions can be sent to communityinvestments@uwsuncoast.org



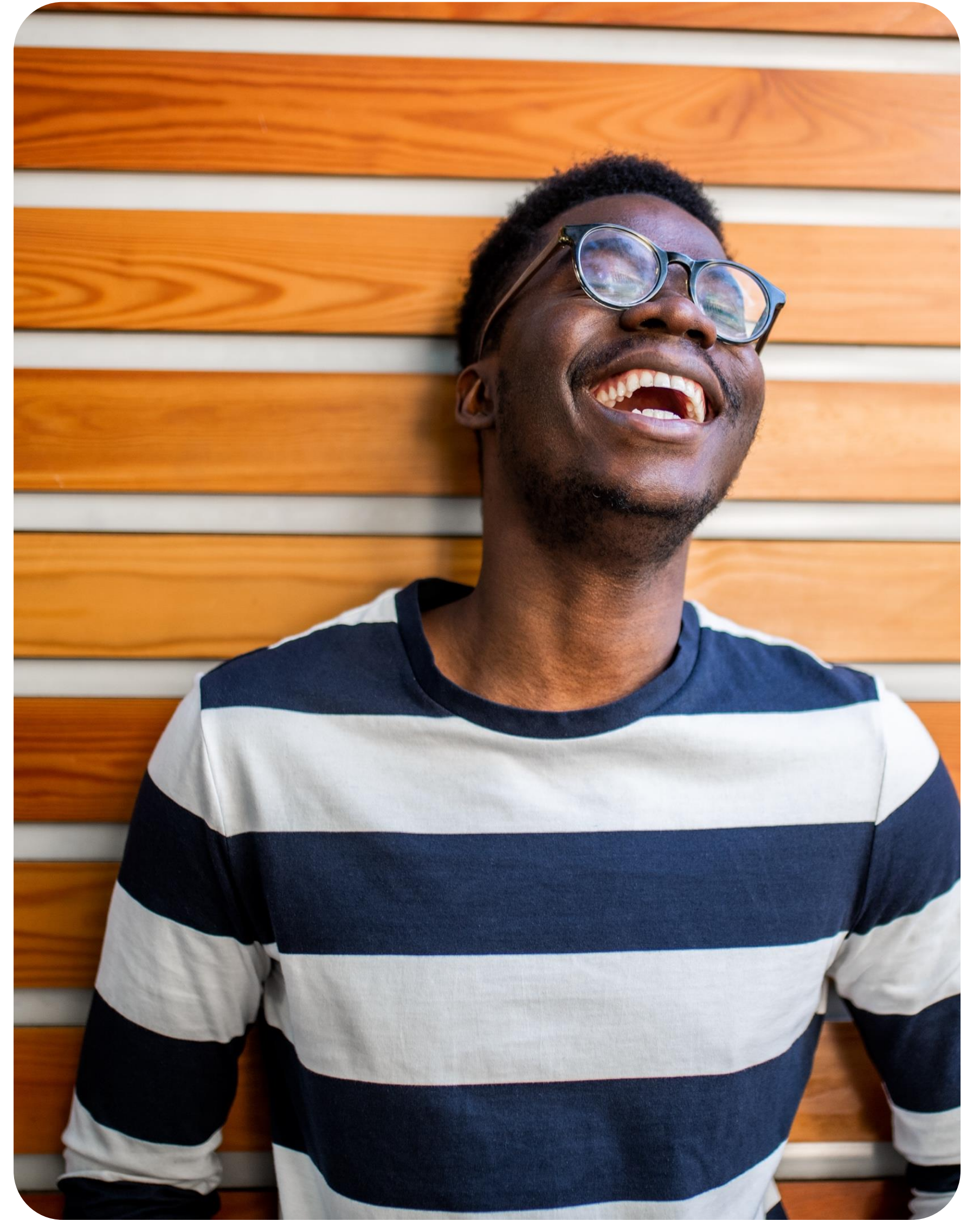
United Way Suncoast

UWS connects people to causes and creates life-changing impact

Our goal is to fight for the education and financial stability of every person in the communities we serve to create opportunities for all. We provide and facilitate leadership opportunities for volunteers, donors and organizations to make lasting, true impact for generations to come.



United Way Suncoast



Our experience and longevity in the region powers our ability to provide unique solutions to our community's biggest challenges.

With over a century's worth of knowledge to guide us, United Way Suncoast is building a more equitable future today, tomorrow and for generations to come.



United Way Suncoast





THE

MULTIPLIER

The size, strength and history of United Way Suncoast and its partners delivers exponential impact. This is our multiplier effect. We leverage all resources to provide solutions that uplift our entire community.

EFFECT

OUR FUNDING FOCUS

Where we fund

What we fund

How we fund

Why we fund

UWS Program Investments in Early Learning, Youth Success and Financial Stability:

174,640

Investments in collaboratives and emergency supports:

630,661



Neighborhood initiatives

2,025 visits
375,000+ meal kits
165 legal cases
successfully resolved



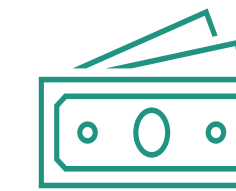
COVID Rapid Response Fund

504,266 residents, 4
million items/services
Over \$1.8 million in aid to
community
Top 4: Meals/food, PPE,
Sanitation, household
items



Publix Last Resort

Provided \$308,000 to 548
Publix and non-Publix
Employees
Top 3: Rent, Electric/Gas
Water, Mortgage



VITA

28 sites
+8,400 tax returns
\$9.2 million in refunds



211s

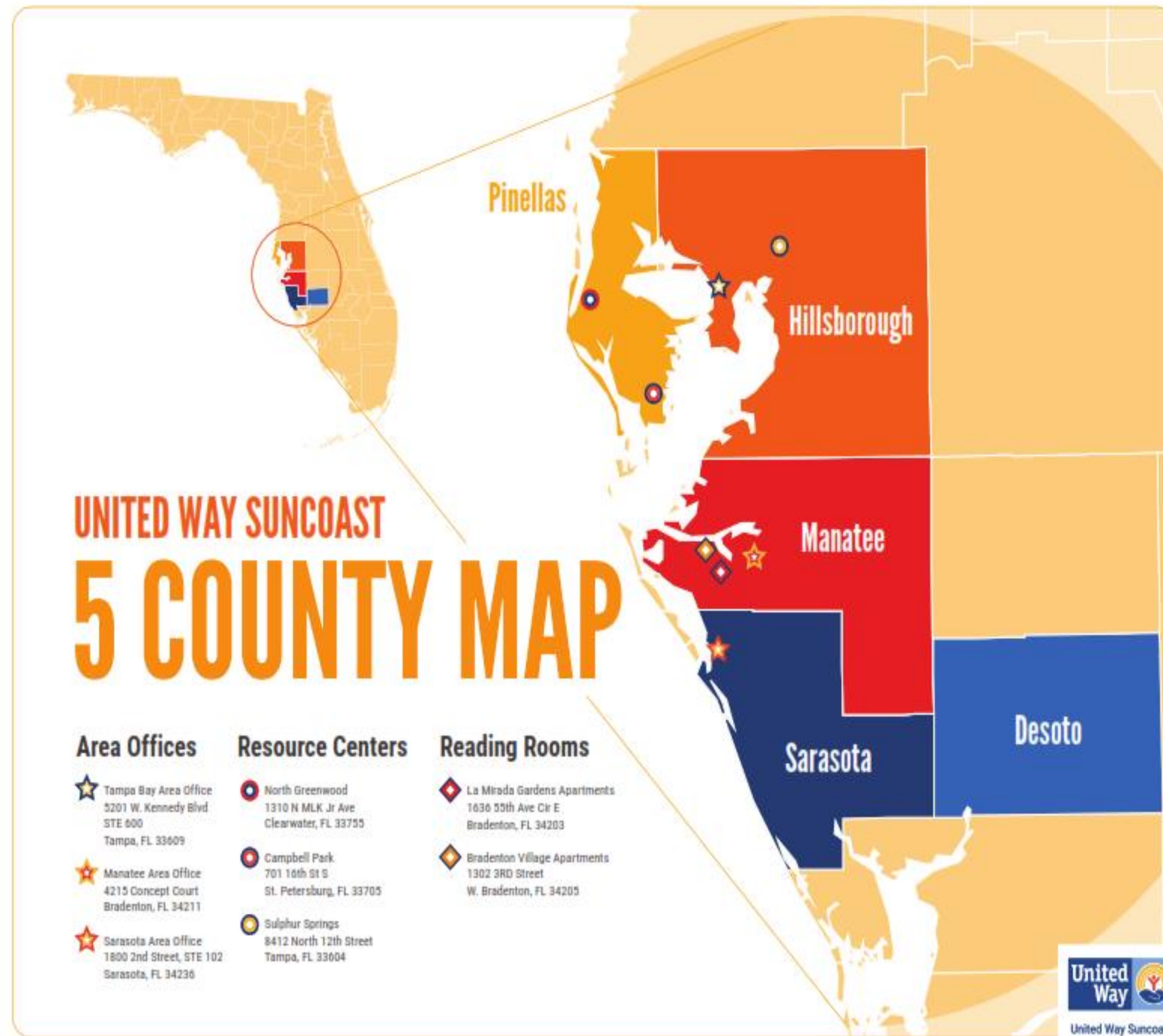
266,000 requests for help

Investment Total: \$9.2 million



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OUR COLLECTIVE IMPACT



FUNDING STREAMS

All grant awards will be for up to three years

Hillsborough and Pinellas Counties

1. Early Learning Investment Stream
2. Financial Stability Investment Stream
3. Youth Success Investment Stream

Manatee County

1. Early Learning Investment Stream

Sarasota and DeSoto Counties

1. Early Learning Investment Stream
2. Financial Stability Investment Stream



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WHAT AND WHERE WE FUND

Place Focus

Within the counties we serve, we focus on neighborhoods, ZIP codes and school attendance zones where our investments and partnerships will do the most good.

ALICE Communities

Asset Limited, Income Constrained, Employed.
Hardworking, and yet struggling residents who have little or no savings and are one emergency from falling into poverty.



Aligned Programs

Defined programs achieving shared community goals in early learning, financial stability and youth success. We invest in the success of the total program, not just in the part funded by our dollars. By investing in a cohort of programs, we hope to support system and population level changes in our areas of focus.

Long-term Collaboration

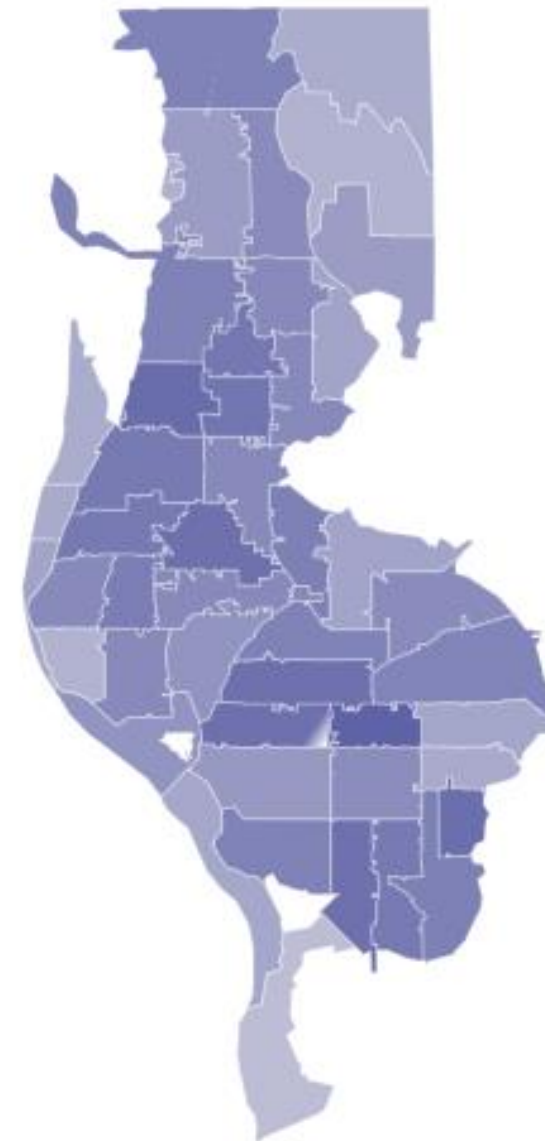
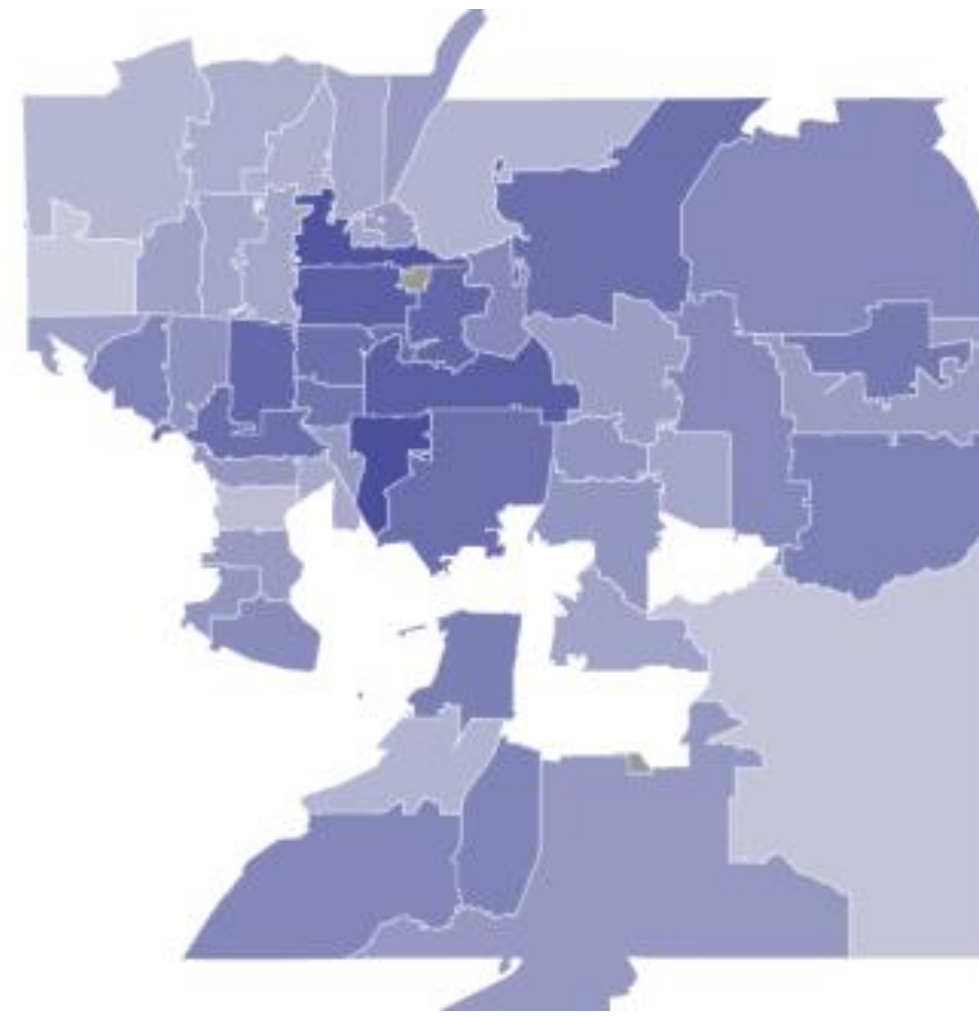
The funding process is initially competitive, in the long term we are seeking partners who can help us to achieve and measure collective impact and collaborators who can share in learning from successes, challenges and new opportunities.

HOW AND WHY WE FUND

Hillsborough Pinellas Counties

Municipalities/Communities

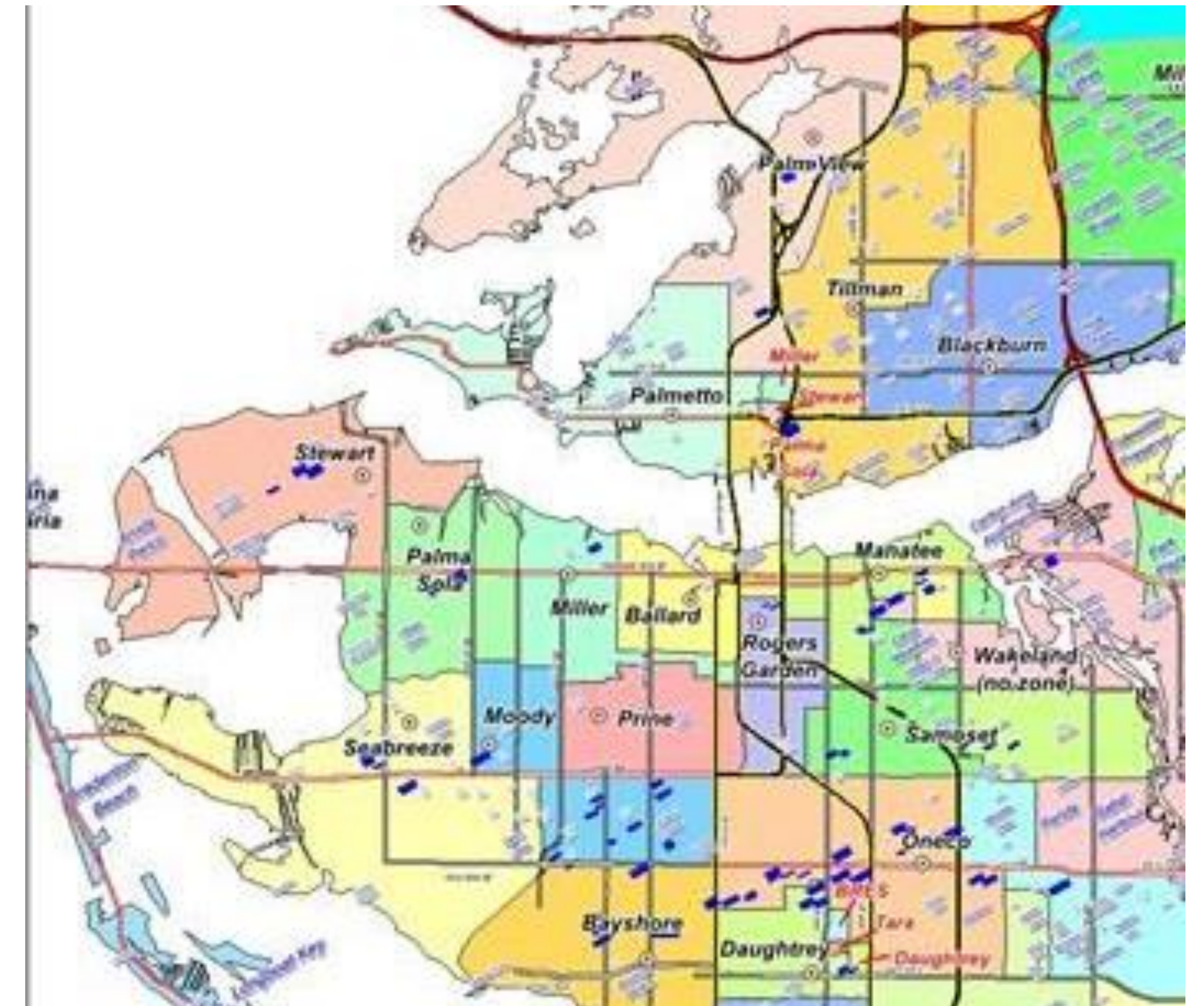
1. Within City of Tampa
 - a. University Area
 - b. Seminole Heights
 - c. Sulphur Springs
 - d. East Tampa
 - e. West Tampa
 - f. Ybor
2. Brandon and Adjacent
 - a. Brandon
 - b. Palm River
 - c. Gibsonton
 - d. Riverview
3. Other Hillsborough County
 - a. Temple Terrace
 - b. Thonotosassa
 - c. Plant City
 - d. Wimauma
4. Lealman, Kenneth City, Pinellas Park
5. Campbell Park and South St. Petersburg
6. Largo
7. N Greenwood and Clearwater
8. Tarpon Springs



Manatee County School Attendance Zones

Ballard Elementary School	Tillman Elementary School
Blackburn Elementary School	Samoset Elementary School
Daughtrey Elementary School	Rogers Garden Elementary School
Manatee Elementary School	Palmetto Elementary School
Oneco Elementary School	Palm View Elementary School

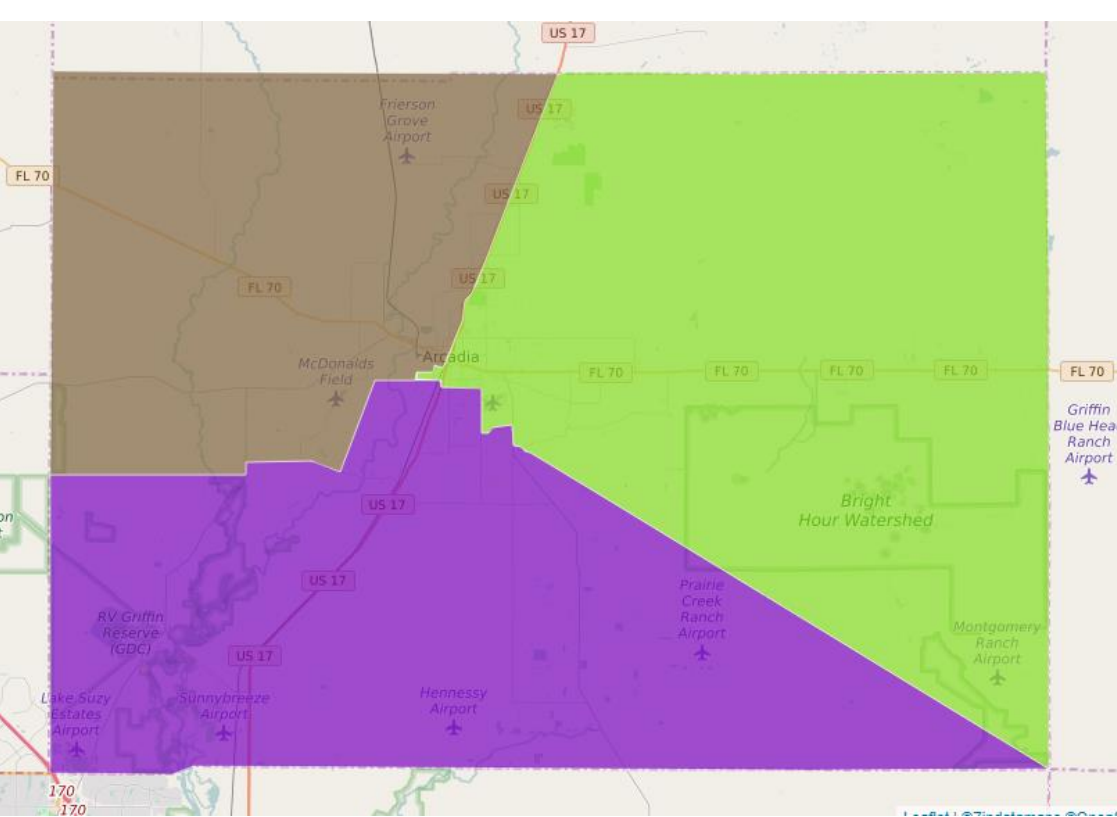
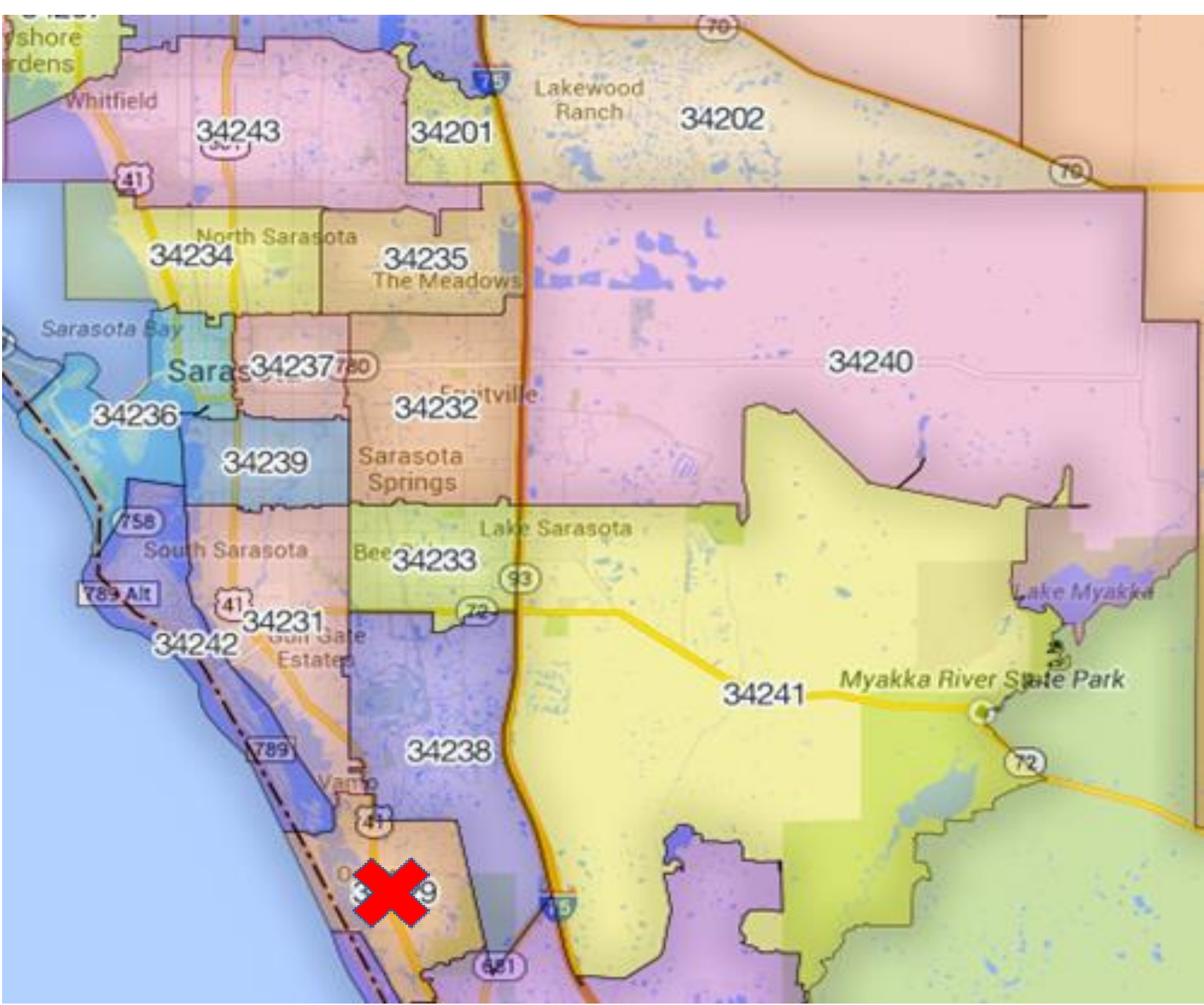
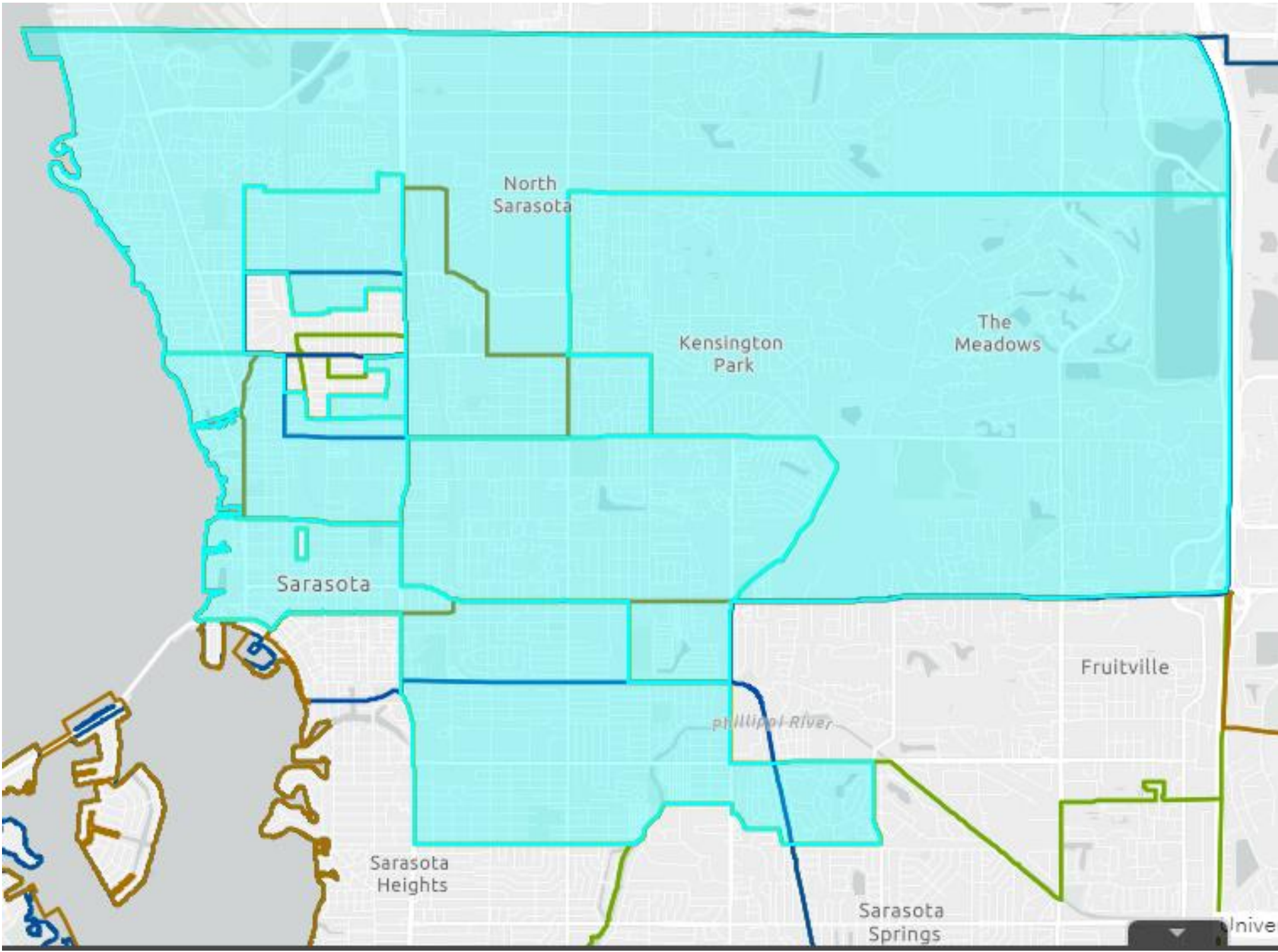
Given the high needs of Myakka City, programs serving 34251 may also use residents from this ZIP code to meet the 75% percent threshold noted above



PLACE FOCUS



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Sarasota County	
Schools of Focus	Wilkinson, Alta Vista, Tuttle, Gocio, and Booker Elementary Schools
Priority ZIP Codes	34231; 34232; 34234; 34235; 34236; 34237; 34239; 34243 (Sarasota)
DeSoto County	
Schools of Focus	West, Nocatee and Memorial Elementary Schools
Priority ZIP Code	34266



PLACE FOCUS

Place Focus Take-Aways

- We use different proxies for geographic focus areas based on localized strategy
- Because of our mission to serve the ALICE population, UWS has identified (through programmatic work, census data and the United for ALICE report) specific focus areas within each county where we fund programs. **To be eligible for funding, at least 75% of your program's total participants must reside in these focus areas.**
- Serving individuals in geographic areas not listed DOES NOT disqualify you from funding; however, those individuals would not count toward the 75% eligibility threshold noted above.
- If serving a combined county region (Hillsborough/Pinellas or Sarasota/DeSoto), the 75% minimum applies to your work across **both** counties in combination, not individually.
- Programs that operate in multiple funding areas would need to apply in each geographic area if seeking funding beyond a single county grouping.

FUNDING STREAMS

Hillsborough and Pinellas Counties

1. Early Learning Investment Stream
2. Financial Stability Investment Stream
3. Youth Success Investment Stream

Manatee County

1. Early Learning Investment Stream

Sarasota and DeSoto Counties

1. Early Learning Investment Stream
2. Financial Stability Investment Stream



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PLACE FOCUS

ALICE Take-Aways

To be eligible for funding through the UWS Community Investment, your program *must* focus on serving those living within the **ALICE threshold**, as well as those living in poverty. You will be asked to provide an estimate for the percentage of program participants in the following categories:

- Above the top ALICE household income
- Within the ALICE threshold
- At or below the Federal Poverty Line

We encourage all applicants to take the time to understand ALICE and determine whether their program is a fit for this population:

- [Florida ALICE Interactive Dashboards](#)
- [The 2020 Florida ALICE Report](#)
- [Florida ALICE County Profiles](#)
- [The United Way Suncoast ALICE Page](#)



A Table defining the Upper and Lower limits of ALICE

	Family		Single Adult		Single Senior	
	<i>Bottom of Threshold</i>	<i>Top of Threshold</i>	<i>Bottom of Threshold</i>	<i>Top of Threshold</i>	<i>Bottom of Threshold</i>	<i>Top of Threshold</i>
DeSoto	\$25,104	\$65,016	\$12,144	\$21,996	\$12,144	\$24,816
Manatee	\$25,104	\$73,560	\$12,144	\$26,028	\$12,144	\$28,596
Sarasota	\$25,104	\$78,180	\$12,144	\$27,624	\$12,144	\$29,928
Hillsborough	\$25,104	\$74,268	\$12,144	\$27,768	\$12,144	\$30,540
Pinellas	\$25,104	\$79,800	\$12,144	\$27,504	\$12,144	\$30,732



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ALICE

<h2>Early Learning</h2>		<h2>Financial Stability</h2>	
RESULT 1	Children enter kindergarten ready to learn (Birth through Pre-Kindergarten)	RESULT 1	Individuals obtain and keep employment that pays a family sustaining wage
RESULT 2	Children read on grade level by 3rd grade (Kindergarten through Elementary School)	RESULT 2	Individuals keep and sustain their assets including access to benefits, safe and affordable banking, and sound financial knowledge
RESULT 3	Barriers to kindergarten readiness and children reading by 3rd grade are reduced (Birth through Elementary)	RESULT 3	Barriers in workforce and asset development are reduced
<h2>Youth Success</h2>			
RESULT	Youth have college and career readiness skills and a clear post-secondary trajectory in middle and high school through on-time graduation		



Early Learning Investments

- Our **Three Results** – Applicants will select **one** result
 - Result 1: Children enter kindergarten ready to learn (Birth through Pre-Kindergarten)
 - Result 2: Children read on grade level by 3rd grade (Kindergarten through 3rd Grade)
 - Result 3: Barriers to kindergarten readiness and children reading by 3rd grade are reduced (Birth through 3rd Grade)
 - *Direct service providers only*
- Our **Indicators** – Applicants will select **one or more** indicator per chosen result
 - Result 1
 - Number and percent of children who demonstrate age-appropriate communication, vocabulary and/or other early literacy skills or progress
 - Number and percent of families who demonstrate appropriate knowledge of and/or engagement in their child's development
 - Number and percent of children who demonstrate age appropriate social-emotional skills needed to function in a school setting or progress
 - Result 2
 - Number and percent of students who read on grade level or demonstrate progress
 - Number and percent of families who demonstrate appropriate knowledge of and/or engagement in their child's development
 - Number and percent of children who demonstrate age appropriate social-emotional skills needed to function in a school setting or progress
 - Result 3
 - Number and percent of children who receive an increased amount of nutritious food
 - Number and percent of children who receive an increased amount of support for asthma, dental, vision and hearing issues

Financial Stability Investments

- Our **Three Results** – Applicants will select **one or more** result
 - Result 1: Individuals obtain and keep employment that pays a family-sustaining wage beyond the ALICE survival threshold.
 - Result 2: Individuals keep and sustain their assets including access to benefits, safe and affordable banking, and sound financial knowledge
 - Result 3: Barriers to engaging in the workshop and creating financial stability are reduced. *Direct service providers only*
- Our **Indicators** – Applicants will select **one or more** indicator per chosen result
 - Result 1
 - Number and percent of Individuals placed in jobs or promoted/given a raise
 - Number and percent of Individuals earning certificates or higher education degrees
 - Result 2
 - Number and percent of Individuals who demonstrate improvement in financial behaviors
 - Number and percent of Individuals who gain access to federal benefit supports
 - Result 3
 - Number of individuals to gain access to identified legal supports
 - Number of individuals to gain access to nutritious food



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PROGRAM GOAL ALIGNMENT

Youth Success Investments

- Our **One Result** – All applicants will select **this** result.
 - Youth have college and career readiness skills and a clear post-secondary trajectory in middle and high school and through graduation.
- Our **Indicators** – Applicants will select **only one** indicator based on the target age of the program.
 - High School
 - Number and percent of high school aged youth who, through experiential learning, classroom training or mentoring**, demonstrate proficiency or progress in essential skills that lead to post-secondary education, steady employment and/or sustainable career pathways.
 - Middle School
 - Number and Percent of middle school aged youth who, through experiential learning, classroom training or mentoring**, demonstrate proficiency or progress in essential skills that lead to on time high school graduation.

Key Take-Aways for Early Learning, Financial Stability and Youth Success

- In addition to whatever your program measures for impact...

Focus Area	Result Selection	Indicator Selection
Early Learning	Choose one	Based on selected result, choose one or more
Financial Stability	Choose one or more	Based on selected result, choose one or more
Youth Success	All select the same	Based on target age group, choose one

- **Data requirements for application**
 - LOI: Total to be served, with the appropriate results/indicators selected
 - RFP: Total to achieve each selected indicator per year of the grant

Key Take-Aways for Early Learning, Financial Stability and Youth Success

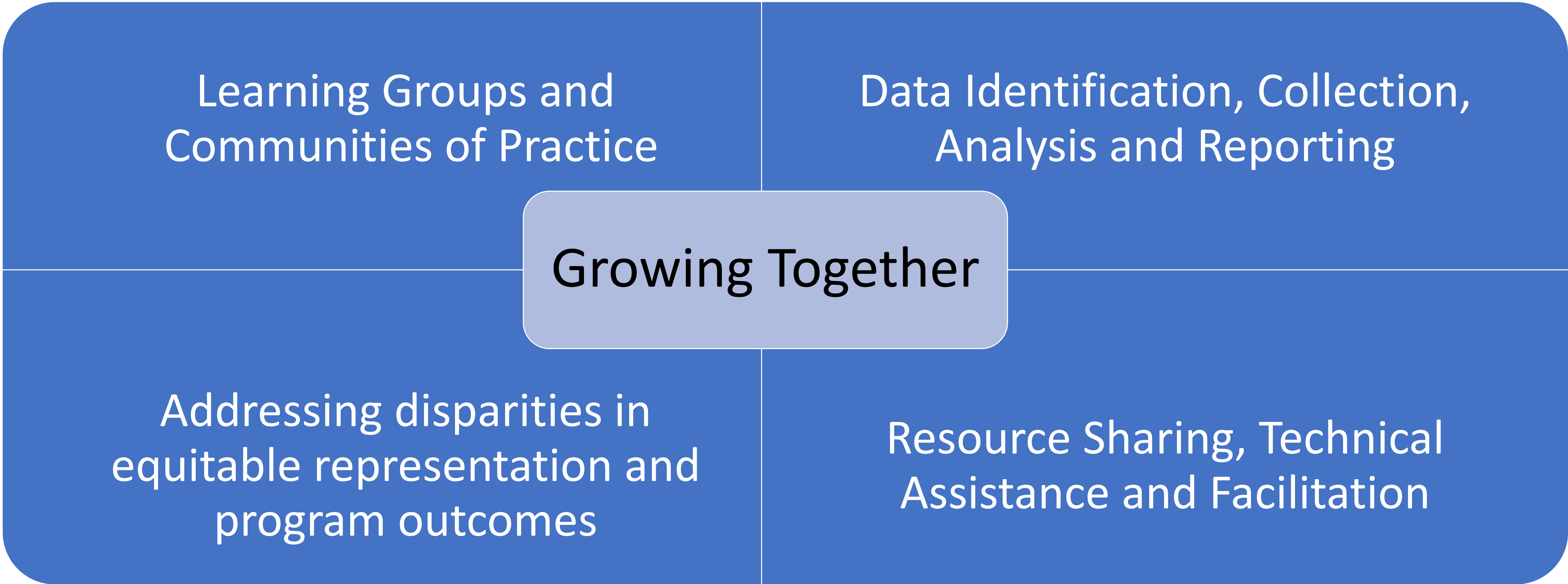
- **Measurement:** All data collected as part of a funded program will need to be measured using verified tools. Our investment guidelines contain specific examples of what this entails for each focus area. Early Learning is provided a list of pre-approved tools, while Financial Stability indicates the specific to that must be used to measure each result.
 - **Example:** To indicate the number of students showing growth in early literacy skills, the program would have to measure this progress using Teaching Strategies Gold, High Scope COR, Bracken School Readiness Assessment, etc.
- **Sub-Indicators:** Youth Success and Financial Stability both have required 'sub-indicators' that funded programs will report on to support the "flagship" indicator that their program is focused on.
 - **Example:** A financial stability program may choose to measure Result 1, Indicator 1: "Number and percent of Individuals placed in jobs or promoted/given a raise." In addition to this data point, we would also ask for:
 - Number and percent of Individuals that retain or advance in job in 6 months, and in 12 months
 - Dollar amount of median wage of all participants
 - Number and percent of individuals who increased their income
 - Number and percent of Bank On checking accounts opened and in use after one year
- **Showing impact:** Reporting impact numbers will be for the whole program, not just the portion directly funded by UWS



United Way Suncoast

PROGRAM GOAL ALIGNMENT

At UWS, we prioritize our role as a collaborator and convener. Our ability to fund good work is tied directly to our ability to fundraise by telling the story of collective impact across our own programs and those with whom we partner. We believe that a community investment goes beyond dollars granted; we invest in a partnership of shared successes as well as shared learning.



OUR FUNDING PROCESS

Key dates

Application structure

Resources

Minimum Eligibility Requirements:

To ensure the viability and sustainability of the proposed programs, the applicant organization **must**:

- Have 501c3 status, or have an established 501c3 organization serving as fiscal agent
- Have at least one full time staff member
- Have been in operation for at least three years
- Serve any of the five counties in the Suncoast Region
- Partner organizations may apply as a collaborative venture with one serving as the fiscal sponsor of the project.

Summary of Programmatic Requirements:

- Program, regardless of the design of the intervention, must align with stated focus area results
- At least 75% of program participants residing in the areas of focus for the county or two-county region for which you are applying
- A strong focus on the ALICE population in addition to households living below the federal poverty line
- Ability to share quarterly and annual participant outcome data using verified measurement tools
- Collect information about and learn to address disparities in program outcomes

Financial Considerations:

- Programs should request what is needed – grants are expected to be between \$30,000 and \$150,000 annually.



WHO CAN APPLY

The 2022 application for funding is a two-part process:

1. Applicants will submit a Letter of Intent (LOI) for **each** program they wish to be reviewed for funding. This is to be completed in E-CImpact, an online grant management system. LOIs will be reviewed to determine if an organization meets the qualifications necessary to be invited to complete a full application.
2. Agencies that meet eligibility criteria and that align with United Way Suncoast's priorities will be invited to submit a full proposal (RFP) in E-CImpact.

Take the following three steps to begin your application:

Step 1: Login or sign up to United Way Suncoast's Grant Portal – E-CImpact

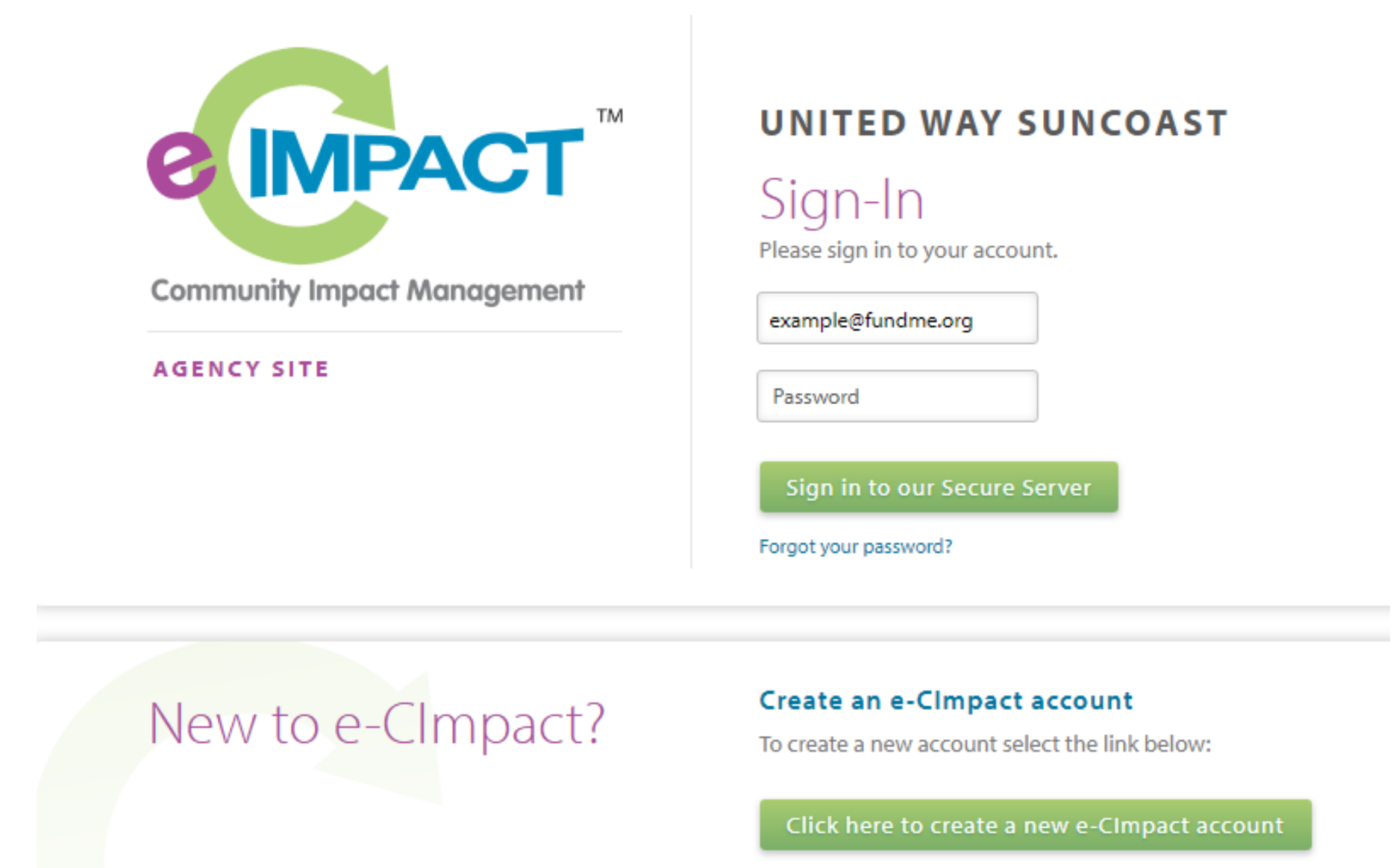
- Use the link provided to open the agency portal page to log in or sign up.
<https://agency.e-cimpact.com/login.aspx?org=11435F>
- Set up your organization account. This will include a summary, mission and key contacts. If your organization already has an account, sign in accordingly.

Step 2: Find Open Investment Streams in the System

- Once you have logged in or signed up, you will find all open funding streams on the left-hand tool bar.

Step 3: Start Letter of Intent (LOI) Process on December 1, 2021 at 9:00 AM

- All eligible organizations are welcome to submit an LOI in one or more funding stream. If you are applying in a different focus area, your agency will need to submit an LOI for each program.



The screenshot shows the E-CImpact login and sign-up interface. On the left, the 'eIMPACT' logo is displayed with the tagline 'Community Impact Management' and a link to the 'AGENCY SITE'. On the right, under the 'UNITED WAY SUNCOAST' header, there is a 'Sign-In' section. It prompts the user to 'Please sign in to your account.' and provides input fields for an email address (example@fundme.org) and a password. A green button labeled 'Sign in to our Secure Server' is below these fields, along with a link for 'Forgot your password?'. Below a horizontal separator, there is a section for 'New to e-CImpact?' with a link to 'Create an e-CImpact account'. This link is followed by the instruction 'To create a new account select the link below:' and a green button that says 'Click here to create a new e-CImpact account'.

Action	Important Dates
Letter of Intent (LOI) for to Apply for Funding	Opens: December 1, 2021 Closes: December 15 at 5:00 PM
Unsuccessful LOI applicants notified	Week of January 24, 2022
Request for Proposal – Invite only Organizations invited to apply will receive updated instructions by Monday, January 24	Opens: January 25 at 9:00 AM Closes: February 8 at 5:00 PM
Virtual Application Follow Ups, as needed Should our review panels have additional questions, we will schedule Zoom meetings to address those.	March 1 – March 10
Physical Site Visits, as needed Organizations who have never been funded by UWS will require a physical site visit; previously funded programs will be notified if a physical visit is required.	March 1 – April 14
Board Recommendations for Funding	May 2022
Agencies Notified	June 2022
Partnership Agreements and Orientation	June 2022
Reporting Partners will submit short, quarterly data updates throughout the three-year grant period. Partners will also submit more detailed narrative and demographic data once per fiscal year.	Ongoing, specific dates TBA
Note: During the 2022 – 2025 grant cycle, additional funding opportunities may open up for programs not currently eligible. However, for any currently eligible program you should assume that the next opportunity to apply for funding will be January 2025	



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2022 APPLICATION TIMELINE

Considerations for successful applications

- UWS has intentionally transformed its investment process from a one year grant to a three year grant to creates trends and allow us to measure true impact; reduce strain on time and resources for UWS and partners; and strengthen our ability to tell stories and fundraise. Consider this lens when applying!
- While we seek unified ways to measure impact, we encourage a diversity of programs and approaches. Lean into your strengths and connections to satisfy grant requirements – don't upend your strategy because of them.
- Our review panels will evaluate from the same framework you have been given, scoring the strength and viability of programs in the following categories:
 - Program
 - Plan
 - Place
 - People
 - Diversity, Equity and Inclusion
 - Budget
 - Results and Indicators

Funding period will be July 1, 2022 through June 30, 2025.

We invest dollars to fund programs, but also to build a community of collaborators and achieve collective impact.

This is a volunteer driven process, led by UWS field experts.



United Way Suncoast

Make careful use of published resources on the UWS site

- unitedwaysuncoast.org/2022-2025-community-investment/
- You can use this one link for all necessary resources, including the full investment guidelines, list of questions asked in the LOI and RFP stages of the grant cycle, evaluation criteria, instructional videos and the portal to compose and submit your applications.
- Additional audio and visual information available here:
 - The [Suncoast Snapshot](#) video series
 - The [Freedom to Rise](#) podcast series

THE BIG TAKEAWAYS

TOGETHER WE'RE GREATER THAN ANY CHALLENGE



United Way Suncoast

Questions?
communityinvestments@uwsuncoast.org