

2025-2028 COMMUNITY IMPACT INVESTMENT OVERVIEW

United Way Suncoast
December 2024



100
YEARS

Agenda

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FUNDING OVERVIEW AND ELIGIBILITY

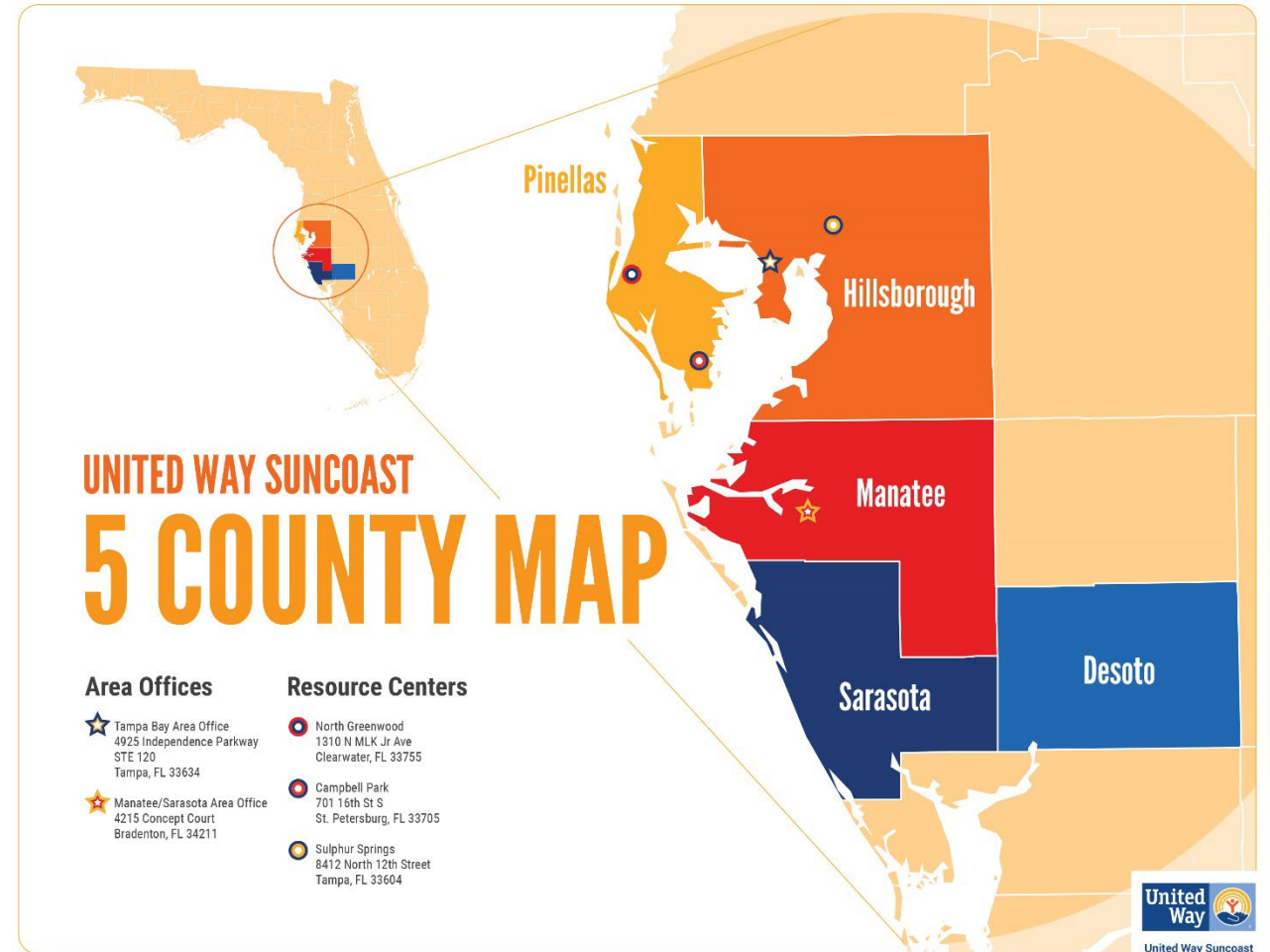


About United Way Suncoast

Our mission is to mobilize communities to action so all can thrive. We provide leadership and investment that improves lives and creates lasting community change by partnering with the caring people of our communities to give, advocate, and volunteer.

Through the **multiplier effect**, we leverage the expertise and resources of our partners alongside our century-long dedication to service and learning to uplift the entire community.

We **invest** in partners and in community through funding as well as **convening and collaboration**. Last year, our network provided 528,000 services to over 100,000 community members.



FUNDING OVERVIEW AND ELIGIBILITY

About the Community Impact Investment

United Way Suncoast (UWS) is seeking applications from nonprofit organizations to receive funding for programs in our focus areas of Education and Financial Security with an emphasis on our priority population, ALICE.

- Funding will be provided to qualifying programs for up to three years, contingent on program performance and continued availability of funds, and is expected to range from \$20,000 to \$100,000 annually (~average of \$60,000).
- Funding will begin on July 1, 2025 and end on June 30, 2028

Organizations will be able to submit applications in two focus areas:

- Education – focusing on kindergarten readiness, grade level reading, age-appropriate development and on-time high school graduation
- Financial Security – focusing on financial well-being through workforce exposure, training and placement along with strengthening supports for youth and adults

Who can apply for funding?

An applicant organization must have:

- 501c3 status or an established 501c3 organization serving as fiscal agent.
- At least one individual committed full time to the management of the program. This can be a full-time volunteer or staff member.
- Been in active operation since at least July 1, 2024 – meaning not just incorporated but also providing services to the community.
- Note: partner organizations may also apply as a collaborative venture with one serving as the fiscal sponsor of the project who must meet the requirements named above.

An applicant program must also meet the following requirements:

- At least 75% of program participants residing in the specific areas of focus within our five counties
- A strong focus on the ALICE population in addition to households living below the federal poverty level
- Ability to share outcome data as well as demographic data for participants
- Alignment with and participation in related regional initiatives
- Willingness to collect information about and learn to address disparities in program outcomes

How and Why 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.

ALICE AND AREAS OF FOCUS

Who is ALICE?

ALICE is an acronym for Asset Limited, Income Constrained, Employed, and represents the growing number of families who cannot afford the basics of housing, childcare, food, transportation, health care, and technology.

Of Florida's 8.8 million households, 4 million had income below the ALICE Threshold. Locally, More than 2 out of every 5 households live below the ALICE Threshold. That's over 628,000 or 45% of all households.

How ALICE factors into our grantmaking:

- It is a framework allowing us to account for high costs of housing, childcare, etc., even for individuals making above minimum wage. It is also a way for us to capture the situation for many members of our community who might not fit outdated definitions of “poverty.”
- Applicants will be required to provide an estimate for the number of individuals/households they plan to serve who would be considered ALICE. Funded programs will be asked to track income for families served (where available) in order to track our collective impact on the ALICE population.

ALICE Income Range for Family of Four		
	Bottom of Threshold	Top of Threshold
DeSoto	\$31,200	\$72,504
Manatee	\$31,200	\$88,800
Sarasota	\$31,200	\$93,768
Hillsborough	\$31,200	\$90,216
Pinellas	\$31,200	\$98,916

Career	Number of workers who are ALICE
Cashiers	More than half
Accounting and Bookkeeping employees	1 in 4
Registered Nurses	1 in 9
Elementary and Middle School Teachers	1 in 6



ALICE AND AREAS OF FOCUS

Focus Communities for UWS

Your program must serve ALICE families in one or more of our Suncoast Counties: Pinellas, Hillsborough, Manatee, Sarasota and DeSoto.

- 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.
- Each focus area is defined by a school attendance zone – the geographic boundary for school assignment based on a family's address - and corresponding ZIP Code. *See example below.*

A Note:

Our funding requirement does not mean the program has to be located at a specific school, nor does it mean the program has to officially partner with that school. It does not mean the children you serve or the children of those you serve have to attend them. However, using the geographic markers provided by the school districts as the boundaries of our investments is an effective way to target individuals who need the most help, including adults with no children.

Sarasota County

You may learn more about the attendance zones for each school, and whether your program is active within them, [by clicking here](#)

Schools of Focus (map)	
Wilkinson Elementary School Alta Vista Elementary School Tuttle Elementary School	Gocio Elementary School Emma E. Booker Elementary School

Corresponding Communities
<u>Municipalities/Communities</u> Primarily but not exclusively north of Hwy 72 - City of Sarasota; Fruitville; Newtown
<u>ZIP Codes</u> 34231; 34232; 34234; 34235; 34236; 34237; 34239; 34243 (Sarasota)



ALICE AND AREAS OF FOCUS

Key Take-Aways for Population and Geography

ALICE

- We do not prohibit grant dollars from being used to serve individuals living below the Federal Poverty Level.
- Because ALICE is defined by a household's location and expenses, we use generalized thresholds to cover a wide variety of families and make reporting simpler. However, you can calculate the survival and sustaining budget for any household you serve using the [United for ALICE](#) toolkit.

Areas of Focus

- In our Community Investment Guidelines, there are tools for you to access maps that will show you the attendance zones for each of the UWS schools of focus. In the application, you will be asked to choose the attendance zones you will be active in and then list all the ZIP codes you will be active in as well.
- 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.

FUNDING PRIORITY DETAILS

Education Funding

UWS will fund programs achieving the following results

- Result 1: Children enter kindergarten ready to learn (0-5)
- Result 2: Students read on grade level and succeed in an elementary setting (5 – 12)
- Result 3: Youth have college and career readiness skills and a clear post-secondary trajectory in middle and high school and through graduation. (12-24)
- Result 4: Learners of all ages gain access to health supports to reduce barriers to attendance, development and engagement

When applying, organizations will select the Result(s) they are focused on. Then, they will select specific indicators and sub-indicators to project and report on that help us determine the scale of progress achieved by your participants. For example:

Result 2: Students read on grade level & succeed in an elementary setting

Indicator: Number of students who demonstrate ability-appropriate growth in reading skills and comprehension

Sub Indicator 1: Number of students who demonstrate growth in reading level of one grade level or more

Sub Indicator 2: Number of students who achieve or exceed the reading level of their current school grade

Important Considerations

Funded programs may or may not focus on developing specific academic skills, but all will be designed to help children and youth reach the results stated above.

To ensure alignment with UWS, make sure you have reviewed our existing **Education Initiatives** as well as our published **Youth Success Research**.

To demonstrate program achievement, you will need to name and describe the measurement tool and/or process the program will use to measure relevant outcomes. Suggested tools are found in the **Investment Guidelines**.



FUNDING PRIORITY DETAILS

Financial Security Funding

UWS will fund programs achieving the following results

- Result 1: Individuals (youth and adults) are given the exposure, skills and supports to obtain and keep employment that pays a family-sustaining wage beyond the ALICE survival threshold.
- Result 2: Individuals keep and sustain their assets through access to benefits and legal aid, safe and affordable banking, and sound financial behaviors.

When applying, organizations will select the Result(s) they are focused on. Then, they will select specific indicators and sub-indicators to project and report on that help us determine the scale of progress achieved by your participants. For example:

Result 1: Individuals are given the exposure, skills and supports to obtain and keep employment that pays a family-sustaining wage

Indicator: Number of unemployed or underemployed individuals placed in stable employment fitting individual ability

Sub Indicator 1: Number of individuals who have increased total annual income

Sub Indicator 2: Number of individuals employed in a position that provides a family sustaining wage

Sub Indicator 3: Number of placed individuals that retain or advance in job in 6 months

Important Considerations

Regardless of the Result selected, all partners will measure the overall financial well-being of the people they serve. The overarching target for this funding stream is to provide a pathway to improvements in financial behaviors.

This will be measured by the Consumer Financial Protection Bureau's **Financial Well-Being Scale****. This is a free tool and does not require formal collaboration with the CFPB.

All partners must also engage with **Bank On Suncoast**.

To ensure alignment with UWS, make sure you have reviewed our existing **Financial Security Initiatives** as well as our published **Youth Success Research**.



FUNDING PRIORITY DETAILS

Program Focus Summary by Impact Area

Education

- Early childhood programs
- Academic development
- Behavioral development
- Caregiver support and training
- Literacy programs
- Mentoring
- College and Career Readiness
- In school and Out of school supports
- Food and health providers for youth

Financial Security

- Internships
- College and Career Readiness
- Job training and certification
- Job placement, support and retention
- Financial coaching and counseling
- Safe banking
- Benefits and aid navigation, including supplemental food access
- Legal aid

Important Consideration

The lists above are not exhaustive; and we are interested in *both* established programs and new/innovative ones. So long as you are measuring outcomes as requested by UWS, we trust your expertise to design and market the type of program that will work best for your local communities.

Key Take-Aways for Programmatic Funding

- When selecting the indicators and sub indicators associated with the Result you have chosen, be sure to carefully examine our [Community Investment Guidelines](#) to ensure that all required sub indicators have been included in your application.
- All data we request is for the **full performance** of the program we've invested in – not just the parts we pay for.
- When formulating a funding request, programs should ask for what is needed and not simply apply for the highest possible amount; **three-year total funding per organization** is expected to range between \$60,000 to \$300,000
- For each program selected for funding, **we plan to fund 100% of the requested amount and do not anticipate partially funding requests**. Please plan accordingly for this when formulating your funding request.
- UWS **does not** require our dollars to be spent or not spent on specific budget line items, with the exception of large capital purchases which cannot comprise more than 50% of your request from UWS. We do seek to understand the budget of your full program, its alignment with the goals of the program and our role in completing that budget.
- You **may** apply for both Education and Financial Security Funding; however, those applications must be submitted separately. Within each application, you can select whichever Result(s) are relevant to your program, and you may select multiple if all apply to a singular initiative at your nonprofit. Programs that are managed separately at your organization, with independent budgets/results/staffing, should be applied for separately as well.
- *A note for past applicants: Youth Success programming has been expanded to reach all counties by including those priorities into the Education and Financial Security funding streams.*



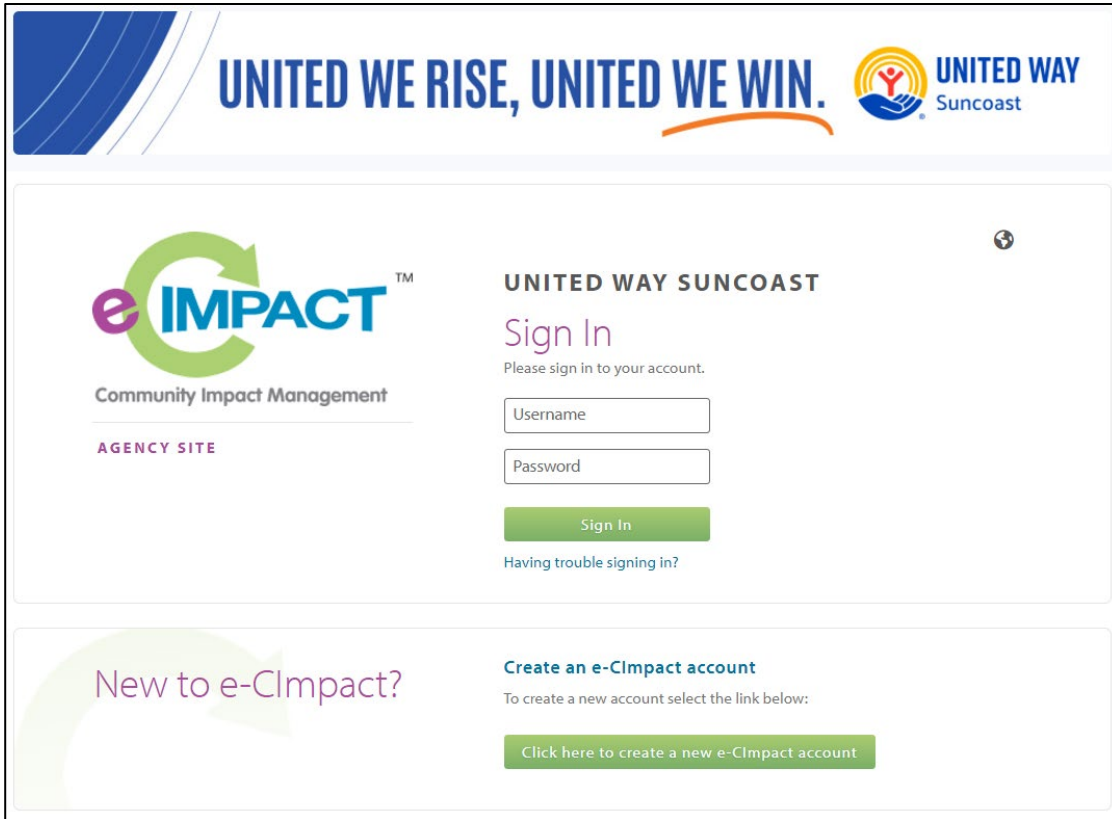
APPLICATION LOGISTICS AND TIMELINE



Important Dates

Action	Important Dates
Request for Proposal Submission Window	Opens: January 6 at 12:00 PM Closes: February 3 at 5:00 PM
Application Follow Ups, as needed Applications will be reviewed by UWS and then again by our expert community panel. During both review stages, you may be contacted via EC-Impact for points of clarification.	February 5 – March 31
Physical Site Visits, as needed Organizations not previously funded will require a physical site visit; previously funded programs will be notified if a physical visit is required.	March 1 – April 14
Organizations who are not moving to community review are notified. Because our review process has multiple steps, we will communicate as soon as possible to those applicants not moving to the final stage.	Mid-March
UWS Board of Director Approval	End of May
Partnership Agreements and Orientation Partnership agreements will be issued and executed virtually. Orientations will be held in person with options at both of the UWS office locations	June Tampa Bay location Lakewood Ranch location
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

E-CImpact Overview



The screenshot shows the United Way Suncoast e-CImpact portal. At the top, it features the slogan "UNITED WE RISE, UNITED WE WIN." and the United Way Suncoast logo. The main content area is divided into two sections. The upper section is for signing in, with the e-IMPACT logo and the text "Community Impact Management" and "AGENCY SITE". It includes a "Sign In" heading, a prompt to sign in to the account, and input fields for "Username" and "Password". A green "Sign In" button is present, along with a link for "Having trouble signing in?". The lower section is for new users, titled "New to e-CImpact?", and includes a link to "Create an e-CImpact account" with the instruction "To create a new account select the link below:" and a green button labeled "Click here to create a new e-CImpact account".

All applications and supporting documentation will be submitted through United Way Suncoast’s online portal.

No emailed or mailed submissions will be accepted.

- [Use this link](#) to open the agency portal page to log in or sign up.
- Set up your organization account. This will include a summary, mission and key contacts.
- Be sure that you enable email contact and that you designate your most active user (not your CEO) as the primary contact.
- *Important for existing accounts.* Verify that that the individual contact profiles for your organization are correct and up to date. This is the only way to ensure timely and accurate communication regarding your application.

After the application opens on January 6, you will be able to view this grant opportunity as an “Open Investment” listed on the left side of the screen.

Tips for Navigating Your Application

UWS will upload EC-Impact guidance to our Community Investments Page by January. Some key things to keep in mind before and during your submission:

- **Bookmark** our application system URL to bypass the need for an “Organization Code.” Simply googling EC-Impact will take you to a generic page requiring additional log in information.
- You can and should manage your individual and organization profile **in advance**.
- When the application is open, you will need to find it in the menu bar on the left of your screen with the title “Current Open Investments”
- The application will be divided into **multiple forms** depending on the information being asked. This will also include a function requiring you to “create and attach” a program to your application before completing the application. The system will have instructions highlighted throughout, as well as help text bubbles (?). **It is critical that you review all of these instructions in full.**
- Our system will not allow you to submit an application until you have actively “Marked my work as Complete” for each of the required forms and attachments. However, you **must** hit the submit button which appears at this stage in order for your application to be accepted. “Completed” is **not** the final status, despite the wording.
- Once your application is under review, EC-Impact will also be the vehicle by which our reviewers ask clarifying questions. Be sure to have your email active and to routinely monitor your application.

NEXT STEPS + Q&A



Other Available Funding from UWS

Needs and services outside of what we presented today? Looking for other types of support? Please be sure to check out our other funding opportunities, available in all five Suncoast counties.

Summer Care 2025 – application due December 23, 2024: We fund scholarships to summer programs that:

- address summer learning loss disparities of ALICE children;
- provide accessible, no-cost, enriching summer camps/childcare during the summer for ALICE families
- provide reading support during the summer camps/childcare; and
- provide financial resources to the parents/caregivers

Our Community Impact Team actively partners with your program to provide connections and resources (including Summer Bridge Books) to meet the goals above. To learn more and complete an application, [visit our webpage here](#).

ACE Innovation Grants – application due dates are January 1 and May 1: We provide grants of up to \$20,000 for organizations under \$2MM in annual revenue for innovative projects/needs that will improve:

- **Access:** Services and solutions are only as effective as they are accessible. What does your organization need to reach ALICE families?
- **Capacity:** Barriers such as inflation and unequal resources hit community -serving organizations especially hard. What would help your organization create the time, space, or experience to expand your ability to achieve meaningful outcomes?
- **Equity:** UWS is committed to challenging all factors of inequity and the impact they have on our community. What would allow your organization the opportunity to be more inclusive in your services and to whom they are delivered?

Awards will be announced in March and July 2025. To learn more and complete an application, [visit our webpage here](#).



NEXT STEPS

Beginning - and Completing - Your Application

Review our full [Community Investment Guidelines](#) document. In addition to what has been reviewed in this presentation, you will find:

- Interactive maps, tools, podcasts and videos to help you learn more about UWS, ALICE, our impact areas and how to use that information successfully in your application
- A complete list of possible indicators for each funding stream
- A complete list of the school attendance zones and ZIP codes of focus that your program is required to serve in order to be eligible for funding
- An explanation of budget categories and attachments to your application that will be requested
- All of the narrative questions presented in one place to help you prepare your responses

Ask questions and attend our office hours. Questions and clarifications about the investment process are welcome and should be directed in writing to communityinvestments@uwsuncoast.org.

- Questions about specific program details will likely not be addressed, unless the answer would be beneficial to all applicants and could be shared among them.
- Please note that all UWS team members and volunteers have been instructed to re-direct any communication regarding the investment process back to the email listed above.

Final Considerations for a Successful Partnership

The solutions we are seeking for our community cannot come about in isolation, nor can they be achieved without prolonged effort. Your application for funding is also a **proposal for partnership**.

We believe that a community investment **goes beyond dollars granted**; we invest in a partnership of shared successes as well as shared learning.

Consider these facets of your initiative when crafting your submission:

- Program & Practice: What are your strengths? What results to those strengths achieve?
- People, Place & Practice: How do you connect with and represent the community you serve? What additional value is created from our partnership?

And remember: 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.



NEXT STEPS

Questions?

THANK YOU!

For follow-up resources:

- communityinvestments@uwsuncoast.org
- unitedwaysuncoast.org/community-investments

United We Rise, United We Win



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YEARS