

# UNITED WAY SUNCOAST

## COMMUNITY INVESTMENT GUIDELINES

For the funding cycle beginning July 1, 2025 and ending June 30, 2028

TOGETHER WE ARE  
GREATER THAN ANY  
CHALLENGE



UNITED WAY  
Suncoast

100  
YEARS

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# How to Use this Guide

## Before You Apply

The United Way Suncoast (UWS) Community Investment Guidelines are meant to give a detailed overview of who we are and how our funding process works. It includes requirements on eligibility, reporting, and programmatic focus. You should read each section carefully, as we have tried to be detailed in our instructions and to anticipate the most frequently asked questions about our grantmaking priorities. The first sections of the document contain information relevant to **all** applicants, with details pertaining to specific funding streams found at the end. In the Appendix, you'll even be able to preview the questions asked in our application.

This is primarily a digital document and contains many [hyperlinks](#) to outside resources and materials that help give a broader view of our work in the community and how we collaborate with our strategic community partners. To follow the links, hover over them and follow the prompt.

## Alternative Resources

While not a replacement for this guide, we wanted to acknowledge that video and audio resources can be a very helpful tool. In addition to the links included in the document, we invite you to review the following:

- Our [Community Investment webpage](#), which will contain a pre-recorded informational PowerPoint presentation (to be posted after December 12, 2024). All other pages on our site describing our work will be useful to you as well.
- The [Suncoast Snapshot](#) video series
- The [Freedom to Rise](#) podcast series

Questions and clarifications about the investment process are welcome and should be directed in writing to [communityinvestments@uwsuncoast.org](mailto:communityinvestments@uwsuncoast.org)

# 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. [United We Rise, United We Win](#)

## About the funding

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.**

ALICE is an acronym for Asset Limited, Income Constrained, Employed, and represents the growing number of families who are unable to afford the basics of housing, child care, food, transportation, health care, and technology. These workers often struggle to keep their own households from financial ruin, while keeping our local communities running. You can find more information on ALICE on page 13 of this document.

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.

Our investment streams are open to any eligible human services agency and are competitive. Please thoroughly read these guidelines before applying. By investing in community partners with their own individual and innovative approaches to supporting ALICE households, our goal is to create a collective impact on the success of children, youth, adults and families.

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

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

A note about Youth Success Funding: Funding for programs supporting youth (12 - 21) has been integrated into the Education and Financial Security funding streams to recognize the overlap of these services. Organizations who may have previously received funding under the Youth Success banner are encouraged to review the newly defined focus areas to determine in which area(s) to seek funding for this new cycle.

## Additional Updates from our Previous Funding Cycle

**Regional Focus:** We recognize that the service boundaries of our partners may not match our own. So long as you operate within the Suncoast and meet all eligibility requirements, organizations will only need to submit one application per program regardless of the combination of counties served.

Additionally, funding for Education and Financial Security focused programs (including those serving youth in either area) will be available to **all** organizations **regardless** of their location. No focus area will be restricted to or from any of our counties.

**Streamlined Applications:** Rather than hosting a two-stage application (with an LOI and RFP stage), we have created a simpler application that only needs to be completed once. We have improved the application process so that: pilot/new programs and established programs have targeted criteria; and it is easier for our review teams to gather additional information from applicants as needed during the review period.

## Investment Process Principles

United Way Suncoast is committed to being an excellent steward of donor dollars through our investment process with clear investment objectives linked to strategic priorities across the region. In order to uphold these values, we have developed a key set of investment process principles.

**Accountability:** The shared responsibility of United Way Suncoast and grantees to follow guidelines, meet deadlines, and report data in an accurate and timely way.

**Collaboration:** Communicating and sharing a clear and measurable vision around specific issues or topics and working together to solve these issues.

**Commitment to results:** Organizational commitment to using data for continuous improvement in partnerships with programs and initiatives supported through investments.

**Diversity, Equity and Inclusion:** Using equity data as a lens to influence our work and discussing the need and benefits of diversity and inclusion in our supported programs and within our communities.

**Shared learning and training:** Working alongside agencies through learning communities. Providing learning and training opportunities for grantees.

**Transparency:** Open and honest communication with grantees and setting clear expectations for performance.

## Our Goals and Why We Fund

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.

Through partnership, we lift up families as they cultivate a future beyond the circumstantial constraints put on them. We provide choices. We provide opportunities. We create space for families to grow without limitations, elevating communities by building a future with equity for all. Lasting change cannot happen alone. We unite our community around our strategic focus to motivate and encourage activism and change.

Partners who receive funding through the 2025 Community Investment can expect an active collaborator in UWS. Any expertise or knowledge that we can share, we will. Any opportunity we have to listen and learn, we will do that as well. We aim to build a diverse cohort of on-the-ground programs that connect and build upon each other's impact to the betterment of the families in our Suncoast region.

### 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.

### 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.

### 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.

### 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.



## Who can apply for funding?

The 2025 UWS Community Investment is open to nonprofit organizations serving the Suncoast region of Hillsborough, Pinellas, Manatee, Sarasota and Desoto Counties – more information regarding specifics of geographic focus and populations to be served can be found below on page 13 - 18.

Please note that **if you have a program that measures outcomes in both of our focus areas, you will have to submit two separate applications** for funding consideration in each. However, you will only need to submit one per focus area even if you are serving multiple counties.

To ensure the viability and sustainability of the proposed programs, the 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 operation in any capacity (501c3 or not) since at least July 1, 2024.

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.

Before being allowed to complete your application, you will be asked to verify these conditions as well as additional programmatic requirements. Starting on page 10, you will find more detail related to those requirements and alignment with UWS priorities.

### Summary of Programmatic Requirements:

- At least 75% of program participants residing in the specific areas of focus within our five-county footprint (explanation below)
- A strong focus on the ALICE population in addition to households living below the federal poverty level
- Ability to share the following data:
  - Quarterly: outcome data using verified measurement tools
  - Annually: participant demographic and zip code related data.
- Alignment with and participation in related regional initiatives
- Collect information about and learn to address disparities in program outcomes

We are investing in the results of your program. Success will be defined in different ways for different programs, but ultimately your program must make a compelling case for its success in helping ALICE families to thrive.



## How to Apply

All applications and supporting documentation will be submitted through United Way Suncoast's online portal. No emailed or mailed submissions will be accepted.

### 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.
- 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.

### 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 Request for Proposal (RFP) Process on January 6 at noon

- All eligible organizations are welcome to submit one or more RFPs in either funding stream. You may attach multiple projects or programs to an RFP submission, though you will enter all details for each.

### Step 4: Select "create new project or program"

- You will see a button in the middle right or top right of your screen to add the title of your project or program. Please click this to add the name of the project or program for which you are seeking support. If the program already exists in our system, simply select the name of that program.

### Step 5: Complete Submission no later than February 3, 2025 by 5 PM

- No late submissions will be accepted
- You are encouraged to attend drop-in application office hours on January 21, 2025 between 2 to 5 pm virtually on Microsoft Teams. To join, [simply click this link](#) during the correct date and time to speak with our team.

### Step 6: Answer follow up questions as needed

- Our grants portal allows reviewers to ask questions directly to applicants via an email notification attached to your submission. Responses will be expected within 3 business days to ensure a timely review process.

## Regional Community Investment Process Timeline

Action	Important Dates
<b>Request for Proposal Submission Window</b>	Opens: January 6 at 12:00 PM Closes: February 3 at 5:00 PM
<b>Application Follow Ups, as needed</b> 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 24
<b>Physical Site Visits, as needed</b> 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
<b>Organizations who are not moving to community review are notified.</b> 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
<b>UWS Board of Director Approval</b>	End of May
<b>Partnership Agreements and Orientation</b> Partnership agreements will be issued and executed virtually. Orientations will be held in person with options at both of the UWS office locations	June <a href="#">Tampa Bay location</a> <a href="#">Lakewood Ranch location</a>
<b>Reporting</b> 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

### Communication during the application process

Questions and clarifications about the investment process are welcome and should be directed in writing to [communityinvestments@uwsuncoast.org](mailto: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.

# Programmatic Requirements and Important Considerations

## Diversity, Equity and Inclusion

We recognize that **diversity and inclusion gains will not be sustained unless our community promotes and encourages new ways of problem-solving** and diversity of thought. We advocate for diverse, equitable, and inclusive practices that unite, rather than divide.

In our work through the Community Investment, we believe it is crucial for all of us as a collective to commit to understanding and responding to disparities and inequities that exist within our organizations (*Who are we hiring/recruiting? For what positions?*) and within the outcomes of our programs (*Who is excluded from our services? Why?*) To read more about how we define diversity, equity and inclusion and about how we strive to enact our principles through community work, [please visit our webpage](#).

Within your application, we will be asking questions directly about your approach to measuring and addressing those types of disparities. We've included below a few items to help you think through your responses.

- **What is an identity group?** When discussing equity, it is common to think of issues of race and racism; however, that doesn't paint the full picture. Identity groups include racial and ethnic identities, as well as other categories including:
  - Sexual preference
  - Neurological diversity
  - National Origin
  - Biological sex
  - Gender expression
  - Religion
  - Economic status
  - (Dis)ability status
  - Age
- **What is a disparity?** A disparity exists when members of one group are disadvantaged compared to members of another because of the design of the program and/or because of systemic discrimination. Examples might include:
  - A significantly higher proportion of White individuals among leadership positions and a significantly higher proportion of People of Color among frontline/service positions
  - A significantly higher success rate among program participants identifying as male vs those identifying as female, despite there being an equal number of male and female participants in the program.
  - Lack of participation in program activities among the LGBTQIA+ community

UWS, along with its partners, will continue **to research, develop, and implement strategies and best practices that dismantle racism and oppression within all aspects of our community** and our society including the removal of barriers to quality education and financial security for all.

For additional resources, please visit the [Center for Nonprofit Excellence](#), the [Nonprofit Village](#), the [Florida Nonprofit Alliance](#), the [Nonprofit Learning Lab](#) and the [National Council of Nonprofits](#).

## Use of Generative Artificial Intelligence

The use of AI-supported chatbots, note takers and internet browsers is becoming commonplace. UWS would like to outline some of our guidance and expectations for applicants along with some items for organizations to consider when using AI (ChatGPT, Claude, CoPilot, etc.) for grant drafting purposes. United Way would like to clarify that this is **not an endorsement** of the use of AI, but a recognition that the technology is present in the industry.

### How to leverage AI as a Tool

In the same way that we do not discourage applicants from using spell-check, we do not discourage you from using AI as a way to assist in your development of a grant application. However, we all know, there are times where when you want to “ignore” the squiggly line to get your point across – even if the computer doesn’t agree with you. The same philosophy should be considered when using a chatbot or other AI tools.

Our suggestion is to create your own content, and then use AI as a highly efficient partner to check for length, readability, tone, etc. You can prompt your preferred tool to adjust the character count to meet application requirements (“Capture the same meaning of this response in only 200 words”), or whether your phrasing matches your intent (“Did I answer the question completely?”). You could even try to have it answer our question for you, but only as a first draft for you to respond to and edit.

### Considerations for using AI

It is important to remember that many of the tools available to you “learn” from a wide variety of sources – not just winning grant applications! In most cases, the tool is just looking to match the ‘form’ of response you are asking for – it is not verifying the accuracy of completeness of the ‘content’ it is producing back to you. We strongly encourage you to look out for and edit away signals of an AI-generated response, like:

- Over-repetition of words and phrases used in the question or prompt
- Topical responses that lack specific details about the context or idea
- Factual errors or manufactured anecdotes
- Formulaic list, paragraph or sentence structure that looks correct but lacks style or does not match other parts of your submission

Successful grant applications, AI-generated or not, capture the human connection between the author, reviewer and the project. Unfiltered AI use can hinder that, and suspected AI use can bias a reviewer’s opinion of the grant application. UWS is committed to addressing that bias directly in our review process, but we also encourage applicants to take steps to avoid it altogether. Like with any tool, use AI to your advantage – and do so judiciously and alongside the rest of your usual resources

## Ethical Considerations and Data Security

Unless you are using a localized AI tool – something you have purchased access to and can make use of on your computer without an active internet connection – all data that you put into an AI supported tool can be used or accessed by the host of that tool. Just as with all online interactions, exercise caution.

You do not have to disclose the use of an AI tool as part of your grant writing to UWS. Beyond the considerations mentioned above that lead to vague and disconnected submissions, you will not be penalized for using AI tools.

### Further Resources

A lot has been written about the use of AI tools in a wide range of industries – the benefits and pitfalls, as well as tips and tricks for using tools effectively. Below are some of those resources we recommend as trust-worthy sources of information:

- [Nonprofit Capacity Building – United Way of Greater Atlanta](#)
- [GPA Statement on The GPA Code of Ethics and Artificial Intelligence - June 2023](#)
- [29 Ideas and GPT Prompts for Nonprofits to Use AI – Nonprofit News Feed](#)
- [AI Equity for Nonprofits](#)
- [AI - Technology Association of Grantmakers](#)

### An Example

We asked ChatGPT : “Write two paragraphs about how AI can be used in grant writing. Please include the pros and cons.” Here’s the unedited response... what do you think?

*AI can enhance grant writing by streamlining research and drafting processes, saving time for nonprofits and individuals seeking funding. Advanced tools can analyze databases to identify grants aligned with an organization’s mission and needs. They also generate initial drafts, incorporating objectives, budgets, and plans, reducing repetitive tasks while ensuring consistent formatting and language. Additionally, AI-driven language models enhance clarity and persuasiveness, tailoring proposals to align with funders’ priorities.*

*However, relying on AI has drawbacks. It may lack the nuanced understanding of an organization’s story or the emotional appeal needed to connect with funders. While polished, AI-generated content might miss subtleties in guidelines or fail to address expectations fully. Overuse can lead to proposals feeling generic or inauthentic, potentially alienating reviewers. Ethical concerns also arise if organizations overly depend on AI, risking a loss of transparency or originality. Balancing AI efficiency with human creativity and oversight is crucial.*

## Funding Population Focus – ALICE

At UWS, we focus our work on a group of families and individuals known as ALICE. This is an acronym standing for “Asset Limited, Income Constrained, Employed” and is a way for us to capture the situation for many members of our community who might not fit outdated definitions of “poverty.” It is a framework allowing us to account for high costs of housing, childcare, etc., even for individuals making above minimum wage.

We encourage all applicants to take the time to understand ALICE and determine whether their program is a fit for this population. Start with the [United Way Suncoast ALICE Report Page](#), and then look to the following for a deeper dive:

- [Florida ALICE Interactive Dashboards](#)
- [Florida ALICE County Profiles](#)
- [Narrative Reports for Florida and the Nation](#)
- For audio-visual access, you can [watch these video summaries](#) about ALICE or search for “ALICE Report” in our **Freedom To Rise** podcast series [here](#).

**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. As part of your application, you will be asked to provide an estimate for the percentage of program participants in the following categories:

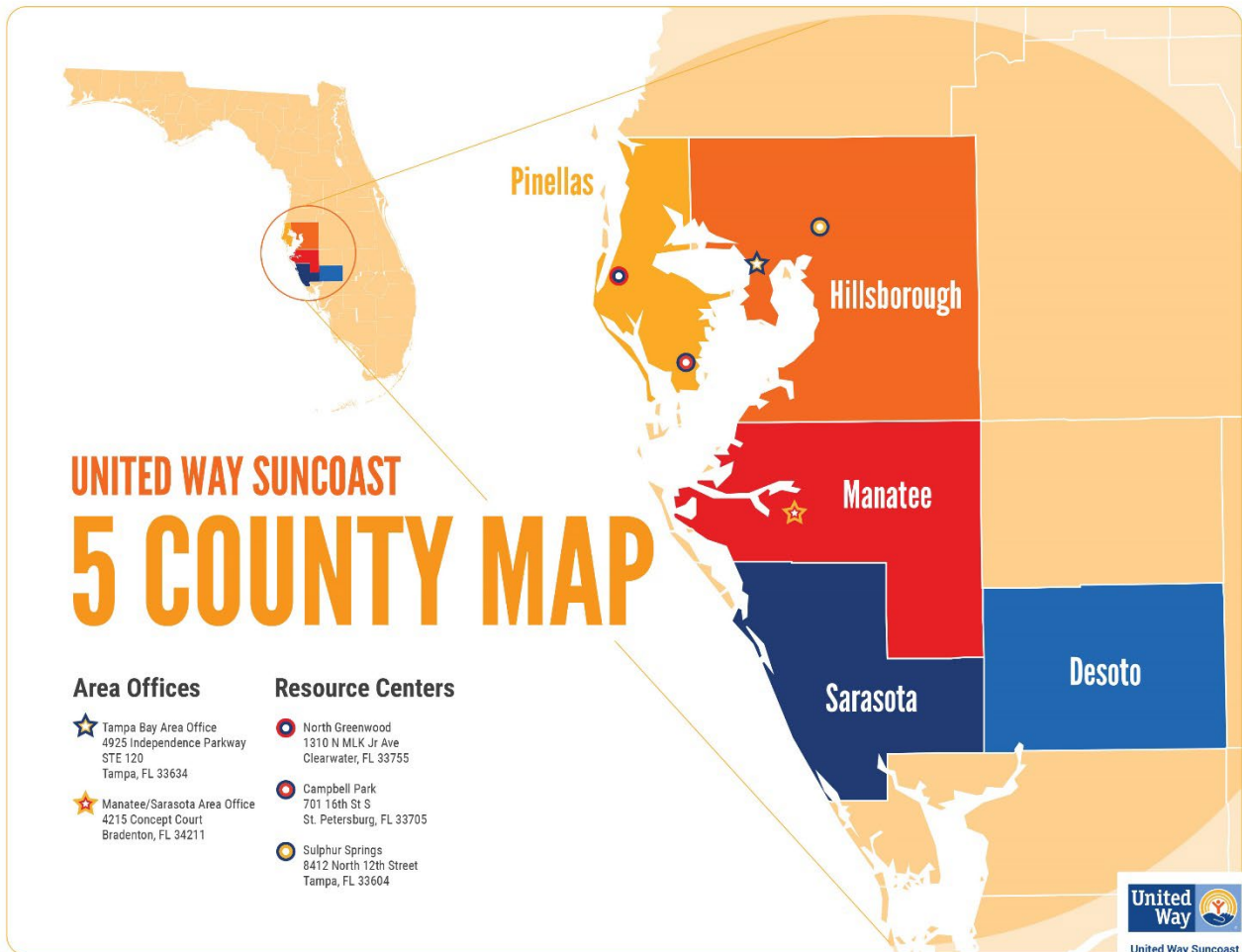
- Above the top ALICE household income
- Within the ALICE threshold
- At or below the Federal Poverty Line

Because the ALICE category is based on a multitude of factors, and because each household is unique in its composition, we have provided a “uniform” ALICE threshold for single adults, single seniors, and families factoring those variables together. When you are asked to make the estimates mentioned above, please use the data from the following table. Counties are separated to account for local costs of living.

### A Table defining the Upper and Lower limits of ALICE

	<b>Family</b> (This was calculated for a 4 person household, but please use as an approximation for any family size)		<b>Single Adult</b>		<b>Single Senior</b>	
	<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>
<b>DeSoto</b>	\$31,200	\$72,504	\$15,060	\$26,544	\$15,060	\$31,368
<b>Manatee</b>	\$31,200	\$88,800	\$15,060	\$31,704	\$15,060	\$36,000
<b>Sarasota</b>	\$31,200	\$93,768	\$15,060	\$33,420	\$15,060	\$37,524
<b>Hillsborough</b>	\$31,200	\$90,216	\$15,060	\$35,688	\$15,060	\$40,356
<b>Pinellas</b>	\$31,200	\$98,916	\$15,060	\$35,856	\$15,060	\$40,464





## Geographic Focus

To be eligible for funding, 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 or corresponding ZIP Code. For each county, please find these pre-identified areas listed below.

Serving individuals in zones not listed DOES NOT disqualify you from funding; however, those individuals would not count toward the 75% eligibility threshold noted above.

## Methodology Overview

Many programs applying for this funding may not be familiar with the school attendance zones of those they serve. A school attendance zone is the specific geographic area indicating that any child living within it would attend that school by default.

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.

By concentrating our programmatic investments around the communities feeding into UWS Schools of Focus - in addition to supporting a stronger school environment - we now have both Education- and Financial Security-focused programs active in the same communities. We know that educational success relies on financial security, and that financial security stems from a strong educational foundation.

To learn more about The Big Plan, our Manatee County initiative that first pioneered a focus on certain schools and their communities, [click here](#).

Below, we have listed by county each of our schools of focus and provided tools for you to determine whether those you serve fall in their stated attendance zones. We have also named the corresponding ZIP Codes and municipalities which may be more familiar. Connecting these two data sets is important because funded organizations will be required to report the ZIP code for each individual served.

The boundaries of unincorporated communities should follow the understanding of those who reside there. Naming conventions provided in this document may be considered a 'guide' to aid in your understanding of school zone and ZIP code locations.

## Hillsborough County

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

<b>Schools of Focus (map)</b>	
<ul style="list-style-type: none"> <li>• Reddick Elementary School (Wimauma, 33598)</li> <li>• Wimauma Elementary School (Wimauma, 33598)</li> <li>• Dr. Carter G. Woodson PK-8 (Sulphur Springs, 33604)</li> <li>• Sulphur Springs K-8 (Sulphur Springs, 33604)</li> <li>• Seminole Elementary School (Seminole Heights, 33604)</li> </ul>	<ul style="list-style-type: none"> <li>• Robles Elementary School (East Tampa, 33610)</li> <li>• James Elementary School (East Tampa, 33610)</li> <li>• Palm River Elementary School (Palm River, 33619)</li> <li>• Kenly Elementary School (Palm River, 33619)</li> </ul>
<b>Corresponding Communities</b>	
<u>Municipalities/Communities</u> <ol style="list-style-type: none"> <li>1. Within City of Tampa               <ol style="list-style-type: none"> <li>a. University Area</li> <li>b. Seminole Heights</li> <li>c. Sulphur Springs</li> <li>d. East Tampa</li> <li>e. West Tampa</li> <li>f. Ybor</li> </ol> </li> <li>2. Brandon and Adjacent               <ol style="list-style-type: none"> <li>a. Brandon/Seffner</li> <li>b. Palm River</li> <li>c. Gibsonton</li> <li>d. Riverview</li> </ol> </li> <li>3. Other Hillsborough County               <ol style="list-style-type: none"> <li>a. Temple Terrace</li> <li>b. Thonotosassa</li> <li>c. Plant City</li> <li>d. Wimauma/Ruskin</li> </ol> </li> </ol>	<u>ZIP Codes</u> <ol style="list-style-type: none"> <li>1. Within City of Tampa               <ol style="list-style-type: none"> <li>a. 33612; 33613</li> <li>b. 33603; 33604</li> <li>c. 33604</li> <li>d. 33610</li> <li>e. 33614; 33607</li> <li>f. 33605</li> </ol> </li> <li>2. Brandon and Adjacent               <ol style="list-style-type: none"> <li>a. 33510; 33511; 33584</li> <li>b. 33619</li> <li>c. 33534</li> <li>d. 33578; 33579</li> </ol> </li> <li>3. Other Hillsborough County               <ol style="list-style-type: none"> <li>a. 33617; 33637</li> <li>b. 33592</li> <li>c. 33563; 33565</li> <li>d. 33598; 33573</li> </ol> </li> </ol>

## Pinellas County

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

Schools of Focus ( <a href="#">map</a> )	
<ul style="list-style-type: none"> <li>• Campbell Park Elementary School (Campbell Park &amp; South St. Pete, 33705)</li> <li>• Lakewood Elementary School (Campbell Park &amp; South St. Pete, 33705)</li> <li>• Fairmount Park Elementary School (Campbell Park &amp; South St. Pete, 33711)</li> <li>• Melrose Elementary School (Campbell Park &amp; South St. Pete, 33712)</li> <li>• Maximo Elementary School (Campbell Park &amp; South St. Pete, 33712)</li> </ul>	<ul style="list-style-type: none"> <li>• Lealman Elementary School (Lealman, Kenneth City, Pinellas Park, 33714)</li> <li>• New Heights Elementary School (Lealman, Kenneth City, Pinellas Park, 33714)</li> <li>• Ponce De Leon Elementary School (N. Greenwood &amp; Clearwater, 33756)</li> <li>• Sandy Lane Elementary School (N. Greenwood &amp; Clearwater, 33755)</li> </ul>

Corresponding Communities	
<u>Municipalities/Communities</u>	<u>ZIP Codes</u>
1. Lealman, Kenneth City, and Pinellas Park	1. 33713; 33714; 33709; 33781
2. Campbell Park and South St. Petersburg	2. 33711; 33712; 33705, 33701
3. Largo	3. 33770; 33771; 33773; 33764; 33778
4. N Greenwood and Clearwater	4. 33755; 33756; 33763; 33765; 33759; 33760
5. Tarpon Springs	5. 34689

## DeSoto County ([map](#))

United Way Suncoast considers the entirety of DeSoto County to be within its scope of focus, with the school zones listed below to match the rest of our guide.

Schools of Focus	West, Nocatee and Memorial Elementary Schools
Corresponding ZIP Code	34266

## Manatee County

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

<b>Schools of Focus</b> ( <a href="#">map</a> )	
Ballard Elementary School Blackburn Elementary School Daughtrey Elementary School Manatee Elementary School Oneco Elementary School	Tillman Elementary School Samoset Elementary School Rogers Garden-Bullock Elementary School Palmetto Elementary School Palm View K-8 School

<b>Corresponding Communities</b>
<u>Municipalities/Communities</u> Rubonia; Palmetto; Palm View; Bradenton (all)
<u>ZIP Codes</u> 34203; 34205; 34207; 34208; 34222; 34221; 34210
<i>Given the high needs of eastern Manatee County and Myakka City, programs serving 34251 may also use residents from this ZIP code to meet the 75% percent threshold noted above</i>

## Sarasota County

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

<b>Schools of Focus</b> ( <a href="#">map</a> )	
Wilkinson Elementary School Alta Vista Elementary School Tuttle Elementary School	Gocio Elementary School Emma E. Booker Elementary School

<b>Corresponding Communities</b>
<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)

# Funding Request Amounts, Financial Eligibility and Documentation Requirements

## Anticipated Grant Awards

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** (\$20,000 to \$100,000 annually).

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. We understand that many requests will be for programs with multiple funding sources and that the funding you are requesting from UWS helps to complete the overall program budget.

We also understand that you may be seeking funding for the same program/services from multiple entities at the time – we absolutely support and do not discourage this as part of your financial planning. If the program for which you apply to UWS for funding is awarded support from another source *and then is also awarded funding by UWS*, we will work with you to identify the best way to support expanded outcomes for your program while not jeopardizing any funding you have received elsewhere.

## Organizational Finances

To be eligible for funding, **applicant organizations should be prepared to submit financial documents from the two most recently available fiscal years.**

The following is the list of documents that will be requested by UWS to review the financial health of the organization, based on the annual budget of the applicant. In an attempt to be equitable, UWS has not requested the same level of documentation from all organizations; however, any organization of any size who can provide an audit is encouraged to do so.

Annual Budget	Financial Documents (from two most recent fiscal years)
\$2 million or greater	Audited Financial Statements, or an Audit containing two years of data
\$500,000 - \$1,999,999	Compiled Financial Statements, prepared by a CPA
\$499,999 or less	Balance Sheet and Profit/Loss statement
<i>An organizational budget and most recently filed IRS Form 990 (depending on the size/expenses of your organization) will be required for all organizations.</i>	

## A note on documentation and timing

Reviewing organizational financial health is a key part of our funding process but is not meant to be exclusionary or overly burdensome. To that end, please be in communication with our team at [communityinvestments@uwsuncoast.org](mailto:communityinvestments@uwsuncoast.org) with any questions or concerns about information being requested.

If the reliable financial recordkeeping for your organization does not match the documentation options listed above, please reach out for guidance and clarification. In addition, if you are not able to provide certain information prior to the February 3 application deadline and require more time, please contact our team to make arrangements. However, **all program details, program budget and organizational budget will be due by February 3 with no exception.**

## Program Finances and Budgeting

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.

While our funding is not restricted to specific budget line items, we have found that certain benchmarks indicate a healthy program budget. Therefore, **to be eligible for funding your budget must meet the following benchmarks:**

- Shared, indirect, and occupancy costs: 25% of three-year program budget or less
- Salary and benefits: 80% of three-year program budget or less
- Other direct program costs: no limit

Below, we have shared an outline of the budget categories you will be requested to complete for your three-year program. You should include all revenue and expenses, not just what is covered by UWS funding.

<u>Income</u>	<u>Expenses</u>
<i>UWS Funding</i>	<i>Salaries/Benefits/Payroll Expenses</i>
<i>Gov. Funding – City/State/County/Federal</i>	<i>Professional Fees and Contracts</i>
<i>Other United Ways Funding</i>	<i>Occupancy (rent, utilities, building &amp; grounds)</i>
<i>Foundation and Corporate Support</i>	<i>Shared/Indirect (shared organizational costs)</i>
<i>Contributions / Donations / Fundraising</i>	<i>Marketing/Outreach/Printing</i>
<i>Membership Dues Received</i>	<i>Program related Travel &amp; Special Events</i>
<i>Other Itemized Income</i>	<i>Other Itemized Program Expenses</i>



## Partnership Expectations

Organizations who are granted funding will receive a full, detailed Partnership Agreement outlining the various ways we intend to collaborate; below, we have shared an overview of some of the expectations we will have for our grant recipients.

### Data and Reporting

Funded programs in our focus areas **report quarterly** on the number of individuals served as well as on the data points listed on pages 23 - 32 of this document. **In your application, programs will need to provide estimates and projections for many of these data points for the three-year grant period.** You will project impact numbers for the whole program, not just the portion directly funded by UWS. Funded programs will also report back on the impact of the whole program.

**On an annual basis, funded programs will be required to submit more detailed data on the individuals they serve** including but not limited to: household income; demographic characteristics; and ZIP code of residence. Partner organizations will be expected to help UWS understand their program's impact on an individual level (ie, which specific person achieved which outcome) as part of measuring our collective impact.

Over the three-year grant period, UWS anticipates evolving into a more effective and efficient processor of community impact data and we look forward to training and working with partners to develop the best collection methods and tools, which may also involve changes from the data points requested in these guidelines.

### Regional Initiatives and Communities of Practice

To support our impact pillars, and to engage the leadership and expertise of our strategic community partners, UWS facilitates task forces and communities of practice that involve regular meetings, resource sharing, and in some cases co-creating initiatives or special programs. Organizations who receive funding through the Community Investment will be invited and expected to participate in those groups that may be relevant to the geography or subject focus area for their program; in the following section, we will detail any of these UWS projects that may require your participation as a funded partner.

### Volunteer Opportunities

Part of the convening conducted by UWS is the gathering of community members to a variety of volunteer experiences. As a funded partner, **we will invite you to share any volunteering needs your program may have and to participate in UWS volunteering events**, including the annual Week of Caring. You may look to see our current volunteer opportunities by visiting [www.volunteersuncoast.org](http://www.volunteersuncoast.org).

# Community Investments in Education

Hillsborough, Pinellas, Manatee, Sarasota and  
DeSoto Counties

## Overview

UWS Education investments focus on programs whose interventions ultimately lead to children **entering kindergarten ready to learn**, elementary students **reading on grade level**, and guiding middle/high school aged youth to an **on-time graduation and post-secondary success**. Funded programs may or may not focus on developing specific academic skills, but all will be designed to help children and youth reach those stated goals of school success and to remove any barriers in their path.

Programs seeking funding should be up to date with relevant existing Education and Youth Success initiatives and strategies supported by UWS:

- <https://unitedwaysuncoast.org/what-we-do/education/>
- <https://unitedwaysuncoast.org/what-we-do/youth-success-research/>
- <https://unitedwaysuncoast.org/what-we-do/education/state-of-early-learning-a-childcare-crisis-2/>

## Results, Indicator and Measurements

**Result 1:** Children enter kindergarten ready to learn

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

**Result 3:** Youth have college and career readiness skills and a clear post-secondary trajectory in middle and high school and through graduation.

**Result 4:** Learners of all ages gain access to health supports to reduce barriers to attendance, development and engagement.

When completing the application, **each program will need to select the Result and Indicator(s) aligned with their program**. These indicators will determine how your application is evaluated and how you will report progress over the grant period. To match the design and impact of your program, you may select multiple Results, and you may also select one or more Indicators within each Result.

Please note that only direct service providers may select Result 4. In other words, your organization should **directly provide** the health support or access to food and be able to track the outcomes of the services provided beyond a basic referral.

Certain indicators are linked together, meaning that you will select one indicator that measures the progress of a whole group (eg, all second graders in your program that have made gains) as well as the achievement of a specific subset of that group (eg, those second graders reading on or above grade level). On the next page, you will see linked indicators formatted this way:

- Indicator
  - Linked Indicator

*Result 1: Children enter kindergarten ready to learn (Ages 0 to 5)*

- Number of children who demonstrate growth in communication, vocabulary and/or early literacy skills
  - Number of children who achieve age/ability appropriate communication, vocabulary and/or early literacy skills
- Number of rising kindergartners entering a K-12 setting ready to succeed based on state standards
- Number of children who demonstrate growth in social-emotional skills and social behaviors
  - Number of children who achieve age/ability appropriate social-emotional skills and social behaviors
- Number of families who demonstrate behaviors indicating increased knowledge and engagement in their child's growth and development

*Result 2: Students read on grade level & succeed in an elementary setting (Ages 5 to 12)*

- Number of students who demonstrate ability-appropriate growth in reading skills and comprehension
  - Number of students who demonstrate growth in reading level of one grade level or more
  - Number of students who achieve or exceed the reading level of their current school grade
- Number of third grade students reading on grade level based on state standards
- Number of students who demonstrate growth in social-emotional skills and behaviors
  - Number of students who achieve age/ability appropriate social-emotional skills and social behaviors
- Number of families who demonstrate behaviors indicating increased knowledge and engagement in their student's growth and development

*Result 3: Youth have college and career readiness skills and a clear post-secondary trajectory in middle and high school and through graduation. (Ages 12 to 21)*

- Number of students who demonstrate growth in social-emotional skills and behaviors
  - Number of students who achieve age/ability appropriate social-emotional skills and social behaviors
- Number of students who improve GPA by a half point or one letter grade
  - Number of students who sustain or improve GPA growth through the following academic year
- Number of middle school students who earn high school course credits
- Number of high school students who earn 6 or more college course credits through dual enrollment or summer programming
- Number of high school students who graduate high school or earn HS equivalency
  - Number of graduated high school students who enroll in a college program with a defined major and career pathway
  - Number of graduated high school students accepted into military or full-time employment with a sustainable wage
  - Number of graduated high school students who enroll in trade school, a workforce credential or accreditation program
- Number of high school students who complete a FAFSA application and are offered financial aid

*Result 4: Learners of all ages gain access to health supports to reduce barriers to attendance, development and engagement.*

- Number of nutritious meals provided to families with school aged children
- Number of students screened for vision concerns
  - Number of students screened for vision concerns and who gain access to care to resolve concerns
- Number of students screened for physical or mental health concerns
  - Number of students screened for physical or mental health concerns and who gain access to care to resolve concerns

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 outside of what is immediately observable. UWS has provided a list of reviewed tools below to steer applicants toward appropriate program evaluation.

Focus Area	Measurement Tool
Kindergarten Readiness Skills	<ol style="list-style-type: none"> <li>1. <a href="#">Ages and Stages Questionnaire</a></li> <li>2. <a href="#">Teaching Strategies Gold</a></li> <li>3. <a href="#">FAST STAR Early Literacy</a></li> <li>4. <a href="#">High Scope COR Assessments</a></li> <li>5. <a href="#">Get Ready to Read Assessment</a></li> <li>6. <a href="#">Neumors BrightStart Preschool Screener</a></li> <li>7. <a href="#">Early Bird Screener</a></li> <li>8. <a href="#">Early Literacy Skills Assessment (ELSA)</a></li> <li>9. <a href="#">Bracken School Readiness Assessment 3rd Edition (BRSA)</a></li> </ol>
Reading and Academic Success	<ol style="list-style-type: none"> <li>1. <a href="#">Florida Assessment of Student Thinking (ELA)</a></li> <li>2. Local School District standardized test data or Report Cards</li> </ol>
Family Engagement	<ol style="list-style-type: none"> <li>1. <a href="#">PICCILO</a></li> <li>2. <a href="#">HOME Inventory (0-3)</a></li> <li>3. <a href="#">Parent Education Profile (PEP) Scale I</a></li> <li>4. <a href="#">Nurturing Skills Competency Scale</a></li> <li>5. <a href="#">University of Idaho Survey of Parenting Practices (UISPP)</a></li> <li>6. <a href="#">ASQ-3 Parent Conf. Form (verify completion of activities)</a></li> <li>7. <a href="#">Life Skills Progression (Nurturing, Discipline, Support of Development)</a></li> <li>8. <a href="#">Abriendo Puertas</a></li> </ol>
Social Emotional Development	<ol style="list-style-type: none"> <li>1. <a href="#">Teaching Strategies Gold</a></li> <li>2. <a href="#">Devereaux Early Childhood Assessment (DECA)</a></li> <li>3. <a href="#">Eyberg Child Behavior Inventory (ages 2 and up)</a></li> <li>4. <a href="#">BRIGANCE Inventory of Early Development</a></li> <li>5. <a href="#">Preschool/Kindergarten Behavior Scales 2nd Edition (PKBS-2) (ages 3-6)</a></li> <li>6. <a href="#">Ages and Stages Social Emotional</a></li> </ol>

	7. <a href="#">High Scope COR Assessments</a> 8. <a href="#">DESSA SEL Assessments</a> 9. <a href="#">Behavioral and Emotional Rating Scale</a> 10. <a href="#">Social Skills Improvement System Rating Scales</a>
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## Additional Considerations for Education Applicants

### Program Alignment in Cohort

As stated above, our goals with this funding are to increase the rates at which children are entering kindergarten ready to learn, reading at grade level, or successful high school graduation. We expect to fund a dedicated portion of programs who can report back to us on those specific data points, but if your program is solely dedicated to family engagement or social-emotional development, please choose the correctly aligned indicators when applying.

### Data Collection and Measurement

For the results we wish to see in Education, using a standardized set of measurement tools is crucial to understanding your programs' level of impact both on the individual and the community as a whole; this is why we have emphasized the list of tools above. Please keep the following in mind when applying:

1. Applicants may make the case for the use of a tool not on this list, so long as it has been independently verified as producing reliable measurement. UWS will make the final determination on whether the proposed tool is appropriate.
2. Understanding the correct usage of the tool you select is important. For example, the Ages and Stages Emotional Questionnaire only becomes a valid measure of growth *if* the pre-test was in a 'grey area.'
  - a. Our goal through community investments is to be a convener and collaborator. Funded partners will always have access to learning opportunities through UWS regarding data collection and analysis.
3. Obtaining student data regarding test scores and performance from school districts can be difficult. For this information, you may consider requesting access to each student's data individually through their parent or guardian if you are not able to enter into a data-sharing agreement with the school.
4. Your program budget can include costs you would incur by using a measurement tool for your program.

### Youth Mentoring programs

While mentorship specific indicators are not included in the outcomes stated above, our goal through this investment stream is to support the holistic efforts you have designed to improve the rates of the more longitudinal data points we are requesting and not single out particular methods. We know that mentoring has impact: as the applicant, you will explain to us how your program design ultimately leads to those outcomes.

# Community Investments in Financial Security

Hillsborough, Pinellas, Manatee, Sarasota and  
DeSoto Counties



## Overview

UWS Financial Security investments focus on programs whose interventions ultimately help individuals to **complete high school on a trajectory toward a sustainable wage, obtain and keep employment** as well as to **build, sustain and protect their assets**. Funded programs will differ in their approach and focus, but all will be designed to help individuals reach those stated goals and remove any barriers in their path.

Programs seeking funding should be aligned with relevant existing Financial Security and Youth Success initiatives supported by UWS:

- <https://unitedwaysuncoast.org/what-we-do/youth-success-research/>
- <https://unitedwaysuncoast.org/what-we-do/neighborhood-programs/>
- <https://unitedwaysuncoast.org/what-we-do/income/>

In particular, applicants should familiarize themselves with [Bank On Suncoast](#) an initiative that provides access to safe and affordable banking products. **All funded programs will be required to coordinate with the UWS Bank On liaison** in order to determine how best to incorporate our work and yours. Read more below.

## Results, Indicators and Measurements

When completing the application, **each program will need to select the Result and Indicator(s) aligned with their program**. These indicators will determine how your application is evaluated and how you will report progress over the grant period. To match the design and impact of your program, you may select multiple Results, and you may also select one or more Indicators within each Result.

Please note that the indicators for Financial Security are **not** referral based; while workforce programs are obviously connecting participants with employment outside of their own organization, all the outcomes we are requesting that our applicants measure must come from the **direct work** of your organization. This can be a formal collaboration with another organization, but cannot include a referral without follow up.

**Regardless of the Result selected, all Financial Security partners\*\* will measure the overall financial well-being of the people they serve.** The overarching target for this funding stream is to see improvements in financial behaviors by providing the supports that would make that possible for ALICE families. If selected for funding, you will report:

### Number of individuals who demonstrate improved financial behavior

- Number of individuals who increase their score by 8 or more points on the CFPB Financial Well-Being Scale\*
- Number of individuals scoring between 50 – 58 points on the CFPB Financial Well-Being Scale
- Number of individuals who increase financial wellbeing through an alternative metric (if not able to complete the CFPB scale due to language, access or ability)

\*The Consumer Financial Protection Bureau's [Financial Well-Being Scale](#) is a free tool that measures the extent to which someone's financial situation and the financial capability that they have developed provide them with security and freedom of choice. Additional required indicators for each investment Result are listed below; while all programs will be required to measure financial well-being, you may select the remaining outcomes that match the design of your program.

\*\*Legal service providers may elect not to report on financial wellbeing if not feasible.

### Result and Indicator Language

Certain indicators are linked together, meaning that you will select one indicator that measures one level of achievement (eg, all individuals placed in jobs) as well as the additional and/or sustained outcomes for that group (eg, those those individuals who sustain employment and/or reach a sustainable wage). You will see linked indicators formatted this way:

- Indicator
  - Linked Indicator

*Result 1: Individuals are given the exposure, skills and supports to obtain and keep employment that pays a family-sustaining wage beyond the ALICE survival threshold.*

- Number of high school students who gain work experience that matches interests and abilities (e.g. internships or jobs)
- Number of high school students who complete a FAFSA application and are offered financial aid
- Number of high school students who graduate high school or earn high school equivalency
  - Number of graduated high school students who enroll in a college program with a defined major and career pathway
  - Number of graduated high school students accepted into military or full-time employment with a sustainable wage
  - Number of graduated high school students who enroll in trade school, a workforce credential or accreditation program
- Number of individuals earning recognized workforce skills, certifications or accreditations
  - Number of individuals placed in jobs within 6 months of certificate attainment
  - Number of placed individuals that retain or advance in job in 12 months
- Number of unemployed or underemployed individuals placed in stable employment fitting individual ability
  - Number of individuals who have increased total annual income
  - Number of individuals employed in a position that provides a family sustaining wage
  - Number of placed individuals that retain or advance in job in 6 months
  - Number of placed individuals that retain or advance in job in 12 months

*Result 2: Individuals keep and sustain their assets through access to benefits and legal aid, safe and affordable banking, and sound financial behaviors.*

- Number of households who reduce Debt to Income Ratio
  - Number of households who reduce Debt to Income Ratio by 5% within a year of intervention
  - Number of households who reduce Debt to Income Ratio by 10% or more within two years of intervention
- Number of eligible individuals who increase their access to new public benefit applications and successfully receive the intended benefit (track type, quantity and value of benefit)
  - Number of benefit applicants also gaining increased access to nutritious food
- Number of eligible individuals who renew public benefit applications and successfully receive the intended benefit (track type, quantity and value of benefit)
  - Number of benefit applicants also gaining increased access to nutritious food
- Number of individuals who no longer require public benefits due to stable and sustaining family income
- Number of individuals who have saved at least \$500 in their savings account
  - Number of individuals who have grown, retained or rebuilt their savings 6 months after the initial \$500 benchmark was achieved
- Number of individuals gaining access to legal supports
  - Number of individuals with legal cases resolved through advice, counsel or extended representation

## Additional Considerations for Financial Stability Applicants

### Indicator Definitions: Sustainable Wage, Debt to Income Ratio, Certifications

Sustainable Wage: Typically, the wage-winner in an ALICE family already has some type of employment; what raises families above the ALICE threshold is the ability to earn enough to both cover expenses and plan for the future. To measure community level progress toward sustainable employment, we are asking all funded programs to track job placements that pay higher than the [ALICE Survival Budget level](#). Tools to determine wage level for location and other household details are [found here](#) and [here](#).

Debt to Income Ratio: In addition to the CFPB scale, comparing total debt to income is a reliable way to quantify a household's movement toward financial security. This ratio is calculated by totaling the total debt of the household (eg, credit card loans, car loans, etc.) and dividing it by the total gross income of the household. To learn more, [access this CFPB resource](#) or [connect with the UWS Financial Security team here](#).

Certifications: We seek to fund programs that provide credentials that would be recognizable to a future employer, either because it meets a governmental or industry standard or because it provides verifiable proof of a developed set of knowledge and skills. Competitive programs will need to describe how the certifications they provide have a direct link to employment opportunities.

### **Data and Collaboration**

As you envision how these data points will be captured during the normal cycle of your program, please note that it is understood that some reporting periods may yield “0,” and that many require at least a year to produce any results. That is exactly why we have transitioned our funding to cover three years of your program.

Our goal through community investments is to be a convener and collaborator. Funded partners will always have access to learning opportunities through UWS regarding data collection, measurement, and analysis. In addition to funding programs in financial stability, we also lead our own; we envision that developing best practices and data collection tools in workforce and asset development will be a collaborative exercise with our partners.

### **Bank On**

Bank On is one of the programs that UWS leads in our financial security work. Being unbanked is a known issue for individuals trying to build and maintain financial wellbeing; assisting individuals who are *underbanked* is just as important. Not all bank accounts are created equal, so while connecting your program participants to banking service is valuable, maximizing their experience is even more so.

A Bank On Certified Checking Account [meets all of the standards on this list](#) to help ALICE families avoid the pitfalls of hidden fees and burdensome eligibility requirements. You can [learn about them here](#), along with all the work being done by the Bank On Suncoast Coalition (which you are welcome to join at any time!)

Because of the proven success of the Bank On Suncoast initiative, all funded partners will be required to connect with our staff team leading the local coalition. Our shared goal will be to determine how best to connect your staff and clients to safe and secure banking products as well as look for ways to leverage your localized expertise and experiences to increase the reach and impact of the Bank On Suncoast Coalition.

# Application Language

# Request for Proposal (RFP) Questions

**Final wording and appearance of questions is subject to change.** Applicants should respond directly to what is requested in the online portal, [e-CImpact](#).

## Budget Form

You will provide the three-year details of the categories listed below:

<u>Income</u>	<u>Expenses</u>
<i>UWS Funding</i>	<i>Salaries/Benefits/Payroll Expenses</i>
<i>Gov. Funding – City/State/County/Federal</i>	<i>Professional Fees and Contracts</i>
<i>Other United Ways Funding</i>	<i>Occupancy (rent, utilities, building &amp; grounds)</i>
<i>Foundation and Corporate Support</i>	<i>Shared/Indirect (shared organizational costs)</i>
<i>Contributions / Donations / Fundraising</i>	<i>Marketing/Outreach/Printing</i>
<i>Membership Dues Received</i>	<i>Program related Travel &amp; Special Events</i>
<i>Other Itemized Income</i>	<i>Other Itemized Program Expenses</i>

## Narrative Form

### Program and Practice

1. Program Name:
2. Please provide a shareable, marketing friendly description of your program and its results.
3. Total Program Budget for 3 years of Operation
4. Total Amount Requested for 3 years of Funding:
5. Why are you requesting this amount specifically from UWS?
6. Annual Organizational Budget:

### *If below \$2 Million*

7. Why are you pursuing this grant opportunity over our ACE grant? Why should UWS make a multiyear investment in your program?

### *If above \$20 million*

7. Your organization may have a larger budget than United Way Suncoast. How is an investment from UWS critical to the success of your program and organization, and what additional value or opportunity does it create?
8. Describe your current involvement in any UWS led initiatives, including but not limited to our directly managed programs, investment opportunities, resource centers
9. Which UWS Results would your program address?
10. Provide a summary of your program’s purpose, operations and activities, including alignment with the focus of UWS and how progress will be made toward achieving the chosen outcomes associated with that result. As appropriate, include the tool(s)/procedure(s) you will use to measure said progress and how it will be used.

11. Beyond the selected UWS indicators, what benefit or gain is provided to your program participants? How is their life changed for the better?
12. Describe the three-year vision for this program, including if and how the program will evolve during that time. What will have changed about the community because of your involvement?
13. Did the proposed program begin operating as described in your proposal before or after January 1, 2023? *If not yet operating, select "after"*

*If operation began before January 1, 2023:*

14. How many years has your program been operational?
15. What results have your participants achieved over that time?
16. How are you building on best practices in your industry to innovate and increase your program's impact?

*If operation began after January 1, 2023:*

14. Would you classify this as a brand-new initiative, or a modification of a previously existing one?
15. What led you to initiate this program?
16. What evidence do you have so far for the effectiveness of this program? Why will it work?

#### People, Place and Policy

17. Which of our counties will your program actively serve?
18. Based on the counties selected, please select the school attendance zones and ZIP codes in which your program will be active. For a full list, see pages 15 – 19 in the 2025 Community Investment Guidelines?
19. Total Number of Unduplicated Individuals Served over 3 years who will receive any benefit from your program
20. Total Number of Unduplicated Individuals Served over 3 years who achieve any of the selected outcomes.
21. Describe your program participants. Who will you serve and why?
22. Based on the resources found on Page 14 of the 2025 UWS investment guidelines, please provide an estimate for the percentage of your program participants or their households who would fall into the following categories:
  - a. At or below the Federal Poverty Line
  - b. Within the ALICE Threshold
  - c. Above the ALICE Threshold
  - d. Unable to collect/determine
23. Describe your relationship with the communities your program will serve. How have you developed a meaningful connection to the residents of those communities? How have you collaborated with other entities as well as community leaders to build trust among and support ALICE families?
24. Describe your intention and specific plans to deepen your relationship with the communities your program will serve through 2028. How will you monitor the

needs of the community and ensure the voices of the people you serve are accounted for as you strive to meet those needs?

25. Who do / Who will you collaborate with directly to maximize your program’s success? Why will that collaboration be beneficial?
26. What existing initiatives focused on advocacy and community-level change are you involved in or plan to be involved in?
27. How are you measuring and addressing potential disparities in representation, service delivery and outcome among different identity groups for the population your program aims to serve and the people it employs?

**Budget and conclusion**

28. Please provide any context you think is relevant for us to know regarding your program and/or organizational budget, including likelihood of funding from other sources beyond the first year.
29. What else about your organization or program is it critical for us to know as we make our funding decisions?

**Outcomes Form**

You will select your focus area and results most aligned with your program, and the relevant indicators will then be available for you to choose. You will provide three-year projections for most of the indicators listed on pages 23 through 32 of this document. Because some indicators are reliant on others, some listed in that section will only be used for reporting purposes *after* the grant has been awarded.

**Attachments**

The following will be requested:

- Organization Budget
- Most recently filed form 990
- Financial documents covering two years:

<b>Annual Budget</b>	<b>Financial Documents (from two most recent fiscal years)</b>
\$2 million or greater	Audited Financial Statements
\$500,000 - \$1,999,999	Compiled Financial Statements, prepared by a CPA
\$499,999 or less	Balance Sheet and Profit/Loss statement