

Request for Proposals

United Way of York County

Financial Stability Partner Grants

November 28, 2022

I. Summary

This funding opportunity is an invitation to join United Way of York County (UWYC) in their **Bold Goal to help 3,000 York County families achieve financial stability by 2030**. Key components of this initiative include program performance evaluation, shared performance measures, and collaboration. The three funding categories are:

1. Financial Literacy
2. Workforce Development
3. Economic and Family Support

UWYC is accepting funding proposals until February 21, 2023 for the grant period beginning July 1, 2023. New applicants must submit a [Letter of Interest](#) by December 16, 2022. Agencies funded during the 2022-2023 Funding Cycle are not required to submit a full proposal and should complete an [Intent to Recertify](#) form by the December 16 deadline.

This grant cycle is expected to be for one year, ending June 30, 2023. Continued investment in this initiative is dependent on grantee performance and continued alignment with United Way of York County's investment priorities.

II. Funding Goals, Strategies, and Measures

All applicants must be able to describe their alignment to UWYC's Bold Goal. UWYC will only provide funding support to organizations that have demonstrated the ability to directly address one or more financial stability priorities in the areas of Financial Literacy, Workforce Development, or Economic and Family Support.

UWYC intends to fund projects that support working families in achieving financial stability. Projects should target the root causes (financial literacy, workforce development, or economic and family support) and implement innovative solutions to:

1. Improve the knowledge, skills, and employability of the local workforce
2. Increase knowledge of financial literacy practices and implement sound financial practices.
3. Support families on the path to financial stability

Target population for all programs must include at least one of the following:

- Participants who are unemployed, underemployed, or not earning income at the Self Sufficiency Standard for family size.
- Single female head of households

Please refer to the [Target Population Guidelines](#) for further information.

Applicants will have the ability to select one or more of the impact areas indicated below in the application form. All Letters of Interest must identify one Impact Area, Goal, and Strategy from the list below, reporting on at least one Reporting Requirement that the program proposes to address.

Issue focused funding is largely unrestricted and can be used for anything necessary to administer the project including planning, personnel, facility expenses, and indirect costs. This funding opportunity is not limited to supporting direct services alone. UWYC recommends that grantees commit to setting aside a percentage of awarded funds towards evaluation and measurement of program success. For example, funds may be used for tracking software, allocated staff time, IT support, or collaboration with another agency on measurement.

Impact Area: Workforce Development
Goal 1: Improve the Knowledge, Skills, and Employability of the Local Workforce
Target Issue 1: Many people do not have the resources in order to be self-sufficient
Strategy 1: Provide clear education paths for adults seeking employment
Strategy 2: Improve technical and soft job skills among unemployed/underemployed
Impact Area: Financial Literacy
Goal 1: Participants increase their knowledge of financial literacy practices and implement sound financial practices.
Target Issue 1: Families and adults often do not know how to manage their resources in a manner that supports financial stability.
Strategy 1: Increase basic financial literacy among members of our community
Strategy 2: Encourage savings and asset development within low-moderate income households
Impact Area: Economic and Family Support
Goal 1 : Support families on the path to financial stability
Target Issue 1: Many people have additional barriers to financial stability
Strategy 1: Connect participants and families to support services that reduce barriers to achieve financial stability

Due to the competitive nature of the funding process, we encourage prospective applicants to consider the above priority areas together with the following guidelines regarding the types of funding opportunities that will receive **special consideration**.

- **Diversity, Equity, and Inclusion (DEI) Efforts-** Priority will be given to programs that focus on community efforts aimed at reducing racial disparities and increasing the understanding for diversity, equity, and inclusion. These efforts may include: community training programs aimed at creating more community advocates around DEI; programming aimed at decreasing specific disparities between populations or neighborhoods; solutions that address systemic, historical, and institutional barriers based on race, gender, sexual orientation, and other identities; and grassroots efforts creating champions for change throughout the York County region.
- **Continuum of Care-** Solutions that provide a continuum of care, connecting participants to needed services and resources outside of the initial program scope.

- **Supportive Services-** Solutions that have built-in supports to eliminate barriers for parents and caregivers of children (examples include: tangible resources such as childcare, hours of operation that accommodate school and work schedules, meals). Please Note: All applications for programs focused solely on childcare assistance will not be eligible for a Financial Stability Partner grant this cycle. Any childcare programs should reach out to Summersby Okey, Director of Collective Impact at sokey@unitedwayofyc.org for more information on UWYC’s Childcare Assistance Program.
- **Collaborations-** Solutions that have established a formalized working partnership with another entity through approved MOUs or contracts.
- **Referral Network-** Willing to register and use a (free) system to make and receive referrals from the UWYC Financial Stability Network.

III. Eligibility

To apply for funding, the organization and the program must meet the following eligibility criteria. Please do not submit a Letter of Interest (LOI) if your organization and/or program does not meet all the criteria below.

Organizational Eligibility:

1. Any tax-exempt agency operating in York County is eligible if the organization meets the following requirements:
 - a. Not-for-profit organization with 501(c)(3) status
 - b. Government agency
 - c. School or academic institution
 - d. Collaborative or consortium
 - e. Faith based organization
2. The organization offering the program has an up-to-date State of SC Registration under the Solicitation of Charitable Funds Act.
3. The organization is compliant with the Patriot Act.
4. The organization possesses a Certified Financial Audit and has submitted an IRS form 990.
 - a. If invited to submit a full application, organizations are required to submit the Certified Financial Audit for its most recently completed fiscal year.
 - b. Organizations must provide the following financial documentation based on their annual revenue:
 - i. *Certified Financial Audit and IRS 990*: Required for tax exempt organizations with gross financial revenue of \$300,000 or more
 - ii. *Financial Review and IRS 990*: Required for tax exempt organizations with gross annual revenue between \$100,000 and \$299,999.
 - iii. *IRS 990 only*: Required for tax exempt organizations with gross annual revenue \$99,999 or less.

Program Eligibility:

1. The program serves residents of the York County area; programs that serve a broader geographical range must show that funds will only be used to support York County residents.
2. The organization requesting funding has been in operation for at least two years or collaborates with a community partner that has been previously vetted by UWYC.

3. The program aligns with UWYC funding Goals and Strategies and can meet the required Program Measures for the impact area, goal and strategy selected.

Restrictions:

1. The program may not require religious activities as a condition of service and must provide services to all participants regardless of faith or denomination. Furthermore, the organization’s programs and affairs must be conducted without discrimination based on race, religion, color, sex, sexual orientation, gender identity, age, national origin, ancestry, citizenship, veteran, or disability status.
2. UWYC does not provide support to an organization’s capital campaign.
3. Organizations or programs who have compliance violations are not eligible.
4. Incomplete or late Letters of Interest or applications are not eligible.

Please Note: All applications for programs focused solely on **childcare assistance** will not be eligible for a Financial Stability Partner grant this cycle. Any childcare programs should reach out to Summersby Okey, Director of Collective Impact at sokey@unitedwayofyc.org for more information on UWYC’s Childcare Assistance Program.

IV. Data and Performance Measures

Applicants seeking funding must demonstrate their ability to track common standard performance measures demonstrating their alignment with UWYC’s mission, focus, and priority areas. The following Grant-Specific Performance Measures will answer three questions regarding your program: 1) How much did you do? 2) How well did you do? and 3) Is anyone better off?

Standard REQUIRED Performance Measures for all Grantees

Performance Measure	Description
# of participants served	Total # of participants who are directly benefiting from the program YTD. This is an unduplicated count from the full funding cycle.
# of participants served (new)	New= unduplicated, first encounter

Once funded, all grantees must be able to track the ages, gender, race/ethnicity, educational attainment, household income level, household size, and zip code of residents for all participants. Breakdowns for each demographic category will be provided to funded partners upon award.

Grant- Specific Performance Measures

V. Funding Timeline

Letters of Intent and Intent to Recertify forms are due by **Friday, December 16 at 5:00 PM EST**. Late submissions will not be considered.

Invitations to complete eligibility and submit an application will be sent out by Monday, January 16, 2023.

The online application forms will be available beginning **February 1, 2023**.

RFP Released	November 28, 2022
Letter of Interest/ Intent to Recertify Due	December 16, 2022
Invitations to Apply are Sent	January 16, 2023
Application forms available	February 1, 2023
Final Applications Due	February 21, 2023
Review Meetings	March 6-9, 2023
Notification of Awards	June 2023
Grant period begins, funding released	July 2023

VI. Terms and Conditions

Once selected, grantees will be required to meet the following terms for funding:

- Attend and actively participate in any community meetings offered by UWYC during the grant period. These meetings may include collaborating on shared goals and coordination of services or trainings and technical assistance support.
- Support an integrated communications strategy. This may include coordination of publicity and marketing of your program with UWYC, as well as sharing progress reports via public communications.
- Provide quarterly progress reports to UWYC. Reporting will consist of narrative and number inputs. Detailed expenditures will not be reported.
- Provide regular updates about evaluation activities, challenges, and progress of the project through conference calls or in-person meetings with the UWYC staff, as needed.

Further information regarding these requirements will be made available at the time of funding. These requirements are intended to evaluate the project's effectiveness, identify where adjustments may be necessary, and inform how UWYC can support grantees.

UWYC intends to use the proposal materials of awarded initiatives on our website and other public communications to describe the projects we help support.

VII. Submitting the Letter of Interest (LOI)

Once eligibility is determined, follow the steps below to prepare and submit the program's LOI:

- Please submit one LOI per program.
- The LOI consists of two parts:
 1. **Cover Sheet:** The cover sheet should be typed on organization letterhead and include the information listed below.
 - a. Organization address, phone, fax, email, and website
 - b. Contact information for the organization's Chief Professional Officer (Executive Director, President, etc.): Name, Title, Phone Email
 - c. Signatures of the Chief Professional Officer and Chief Volunteer Officer (Board Chair, etc.)
 - d. Contact information for the Primary LOI Contact: Name, Title, Phone, Email
 2. **LOI Template:** Please answer each question on the separate [LOI template](#). Responses on the template must NOT exceed 2 pages.

- Please combine the Cover Letter and 2-page template into one PDF document.
- Submit the LOI via email to Summersby Okey at sokey@unitedwayofyc.org.
- **LETTERS OF INTEREST ARE DUE BY 5:00 PM ON DECEMBER 16, 2022. LATE LOIs WILL NOT BE ACCEPTED.**

VIII. Submitting the Intent to Recertify Form (ITR)

Once eligibility is determined, follow the steps below to prepare and submit the program's Intent to Recertify:

- Please submit one ITR per program.
- The ITR consists of two parts:
 3. **Cover Sheet:** The cover sheet should be typed on organization letterhead and include the information listed below.
 - a. Organization address, phone, fax, email, and website
 - b. Contact information for the organization's Chief Professional Officer (Executive Director, President, etc.): Name, Title, Phone Email
 - c. Signatures of the Chief Professional Officer and Chief Volunteer Officer (Board Chair, etc.)
 - d. Contact information for the Primary ITR Contact: Name, Title, Phone, Email
 4. **LOI Template:** Please answer each question on the separate [ITR Template](#) Responses on the template must NOT exceed 2 pages.
- Please combine the Cover Letter and 2-page template into one PDF document.
- Submit the ITR via email to Summersby Okey at sokey@unitedwayofyc.org.
- **INTENT TO RECERTIFY FORMS ARE DUE BY 5:00 PM ON DECEMBER 16, 2022. LATE ITRs WILL NOT BE ACCEPTED.**

IX. Next Steps

- Invitation to Submit a Full Application: LOIs are reviewed by UWYC staff and volunteers. Organizations and programs that meet eligibility requirements and funding priorities will be invited to submit a full application. Full applications are due no later than February 21, 2023. Late or incomplete applications will not be accepted.
- Invitation to Recertify: ITRs are reviewed by UWYC staff and volunteers. Organizations and programs that meet the requirements will be invited to submit an abbreviated Financial Stability Partner Grant Recertification Application. These applications are due no later than February 21, 2023. Late or incomplete applications will not be accepted.
- Application Evaluations and Approval: Applications are reviewed by volunteers and UWYC staff. Applicants recommended for funding are then approved by the UWYC Board of Directors. Applicants are not guaranteed to be awarded funding. Funding decisions will be communicated to the applicant on or before the award date specified in the grant cycle.