

## United Way of the Battle Creek and Kalamazoo Region Request for Income Strategic Funding Proposals

### OVERVIEW

United Way of the Battle Creek and Kalamazoo Region (UWBCKR) envisions a vibrant community where all people realize their full potential. UWBCKR leads shared efforts by engaging diverse people, ideas and resources. UWBCKR seeks strategic funding proposals from eligible organizations committed to improving community outcomes under our impact area of Income.

We are focused on four commitments to ensure every person can learn more, earn enough and live a healthy life:

Education: Improve high school graduation rates and reduce racial and economic disparities in graduation rates.

**Income: Increase the number of economically stable households in the region.**

Health: Improve family and infant health and reduce racial and economic disparities in related indicators.

Basic Needs: Ensure that our regional community has a safety net in place to help individuals and families access basic necessities during times of need.

**Additionally, UWBCKR has a special interest in creating equitable opportunities and reducing racial and economic disparities in the systems and outcomes related to the above commitments. Therefore, program services that intentionally address these issues are strongly encouraged, and the collection of demographic data will be required by funded programs.**

United Way has a special interest in supporting collaborative efforts bringing together two or more agencies to deliver program services. Collaborative applications designed to create meaningful increases in efficiency and impact on community goals are encouraged. If interested in developing a collaborative proposal, a lead agency must be designated and Memorandums of Understanding will be required for each participating organization. Please contact a member of the Community Impact Team for a conversation prior to developing your application.

Organizations may submit more than one request within each impact area or across multiple impact areas. Programs or initiatives that occur in *either* the greater Battle Creek community, Kalamazoo County or *regionally* (across both greater Battle Creek and Kalamazoo County) will be equally considered.

Grant applications must request funding support for operations costs related to delivery of programs and initiatives; grant applications for overall agency operational support will not be accepted. Additionally, requests for capital improvements/campaigns will not be accepted for consideration.

The minimum request amount for each strategic grant is \$25,000; there is no established maximum grant request amount.

### ELIGIBILITY

To be eligible to apply for this multi-year funding opportunity, the applicant organization (whether applying itself or acting as lead agency or fiduciary) must:

- Be exempt under section 501(c)(3) of the Internal Revenue Code **or** a Public Entity
- Operate within the Battle Creek/Kalamazoo region and/or serve Battle Creek/Kalamazoo region residents
- Employ a minimum of 2.0 Full Time Equivalent (FTE) staff
- Prohibit discrimination based on race, color, religion, age, sex (including pregnancy), national origin, marital status, sexual orientation, gender identification, veteran status, disability, genetic information, height or weight
- Submit all required application materials, including required financial documents, completely and accurately by the deadline given. See page two for required financial document table.

### PROCESS TIMELINE

If the applicant agency has not attended an e-Impact training in the past 12 months, attendance at an informational session is required to apply for funding. Training opportunities will occur regionally on **Thursday, November 29, 2018 and Thursday, December 6, 2018**. Training dates, times, and locations are listed on page three.

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E-CImpact, the web-based application system, will be open from Monday, **November 19, 2018** to the submission deadline of **Wednesday, January 9, 2019 at 5:00pm EST**. Applications must be initiated on the system by **Wednesday, December 21, 2018**. No new applications will be opened after that date.

Grant announcements will be made on Wednesday, April 17, 2019. Grantees will receive monthly allocations beginning **July 1, 2019**.

### TECHNICAL ASSISTANCE

During the RFP process, UWBCKR will provide technical assistance to 1) support interested organizations in assessing alignment with UWBCKR’s strategic funding priorities in Health, and 2) assist applicants with the completion of funding applications via the e-CImpact system.

### APPLICATION REVIEW

Complete applications submitted by the stated deadline will be reviewed initially by the staff of United Way. This review will include a) an assessment of all required sections of information and uploaded documents and b) required organization-level financial documentation to be submitted as a complete grant application packet.

*\*\*See the grid provided below on what Financial Documentation you will need to be prepared to submit based on the financial size of your organization. Please feel free to reach out to us for a discussion if you have any questions.*

Upon completion of the staff review, all documentation submitted within the completed grant application packet and comments from the staff review will be shared with a team of regional volunteers focused on the Income impact area. This volunteer team will be trained by United Way staff to objectively and thoroughly assess 1) alignment of the proposed program application with UWBCKR’s identified strategies and 2) the proposed program’s potential or proven ability to drive progress against both identified indicators and the community level goal.

*\*\*If the program was previously funded by UWBCKR, Performance Data and Year End Reports will also be assessed.*

Please note: Opportunities for clarifying questions and conversations between United Way staff and the applicant organization will be ongoing. United Way requests for additional information can and may occur during the course of the full application review process. Submitted information by an applicant organization found to be incomplete, based on the requirements for the full grant proposal packet, or applicant organizations found to have substantial financial deficiencies may be disqualified from consideration for strategic funding. For more information, please contact a United Way staff member.

Financial Documents required for Application (and ongoing compliance as updated):

Organization Type	Required Financial Documents		
<b>501(c)(3) with \$500,000 or more in contributions</b>	Audits (previous two years) Most recent IRS 990	Most recent Internal Financial Statements w/ Prior Year Comparison	Program Budget & Budget Narrative Questions (Completed in e-CImpact)
<b>501(c)(3) with \$250,000 to \$499,999 in contributions</b>	Audit or Review (previous two years) Most recent IRS 990	Most recent Internal Financial Statements w/ Prior Year Comparison	Program Budget & Budget Narrative Questions (Completed in e-CImpact)
<b>501(c)(3) with less than \$250,000 in contributions</b>	Review (if completed) (previous two years) Most recent IRS 990	Most recent Internal Financial Statements w/ Prior Year Comparison	Program Budget & Budget Narrative Questions (Completed in e-CImpact)
<b>Public Entity</b>	Audit (previous two years) Report on Internal Controls over Financial Reporting	Most recent Internal Financial Statements w/ Prior Year Comparison	Program Budget & Budget Narrative Questions (Completed in e-CImpact)

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### UNITED WAY FUNDED PARTNER EXPECTATIONS

For the duration of the Income grant, approved grant recipients will be required to:

- 1) Attend Periodic Learning Circles (cohort based, peer learning opportunities)
- 2) Complete any additional contractual obligations, including but not limited to UWBCKR campaign participation, submission of Success Stories, and compliance with branding guidelines
- 3) Complete and submit Performance Data and Year-end Reports via the i-CResults and e-CImpact systems
- 4) The collection and submission of client level demographic data will be required by all Funded Partners. Guidelines for demographic data collection will be provided during informational sessions.

Note: If you have any questions on collection of client level demographic data, contact a Community Impact team member.

**NOTE: Basic Needs RFP is also currently available.**

To request this RFP, please contact Heather Rittenhouse at [hrittenhouse@uwbckr.org](mailto:hrittenhouse@uwbckr.org) or (269) 441-1725.

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### INCOME

**Main Staff Contact: Matt Lynn at (269) 441-1718**

Our Income program delivery partners will drive the community level goal of *Increasing the number of economically stable households in the region*, with a target of transitioning 8,500 households in the region to economic stability by 2025. To accomplish this, partners will work within two focus areas:

- Stable and Affordable Housing
- Workforce and Income Supports for Low-Income and Working Families

*UWBCKR has a particular interest in bringing together organizations with programs in a collaborative effort that will impact our focus on providing community-based service supports and/or referrals for employment attainment and retention.*

Each program will be required to demonstrate alignment with identified strategies and measure progress against identified indicators, utilizing evidence-based, reliable and valid assessment tools where appropriate.

Additionally, programs will be required to collect specific demographic data about those served.

More detailed description of the Income focus areas, strategies, and indicators has been attached as Appendix I.

**Recipients of Strategic Income Funding will be eligible to receive funding for the period of**

**July 1, 2019 – June 30, 2022\***

\*Continuation of funding beyond the first eight month period will be subject to satisfactory performance and compliance with contract terms. The amount will be determined based on fundraising results.

### **To Apply for Strategic Income Funding:**

**If applicant agency has not attended an e-CImpact training in the past 12 months, attendance at an informational session is required to apply for funding.** Interested organizations should contact Heather Rittenhouse at [hrittenhouse@uwbckr.org](mailto:hrittenhouse@uwbckr.org) or (269) 441-1725 to register for an informational session about the strategic funding process.

The first half of the session will include information about the process, Income priorities, strategies, and indicators. Organizations will have an opportunity to determine if they would like to attend the second half of the training based on interest and alignment. The second half will provide an overview of the online application system, and the content of the Health application.

**Training and Informational Sessions on proposal development and Funded Partner Agency requirements will occur via video conference in both United Way's Battle Creek and Kalamazoo offices on the following dates and times:**

Thursday, November 29, 2018, 8:00am-9:00am

Thursday, December 6, 2018, 8:00am-9:00am

\*\*Additional one-on-one training opportunities can be requested by contacting Heather Rittenhouse at (269) 441-1725.

## INCOME

### Community Level Goal

Increase the Number of Economically Stable Households in the Region

**Key Indicator:** Recorded Number of Households With Annual Income At/Above the Threshold for Economic Stability (Measured Using the ALICE (**A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed) Income Threshold for Household Economic Stability)

**Target:** Transition 8,500 (6%) of households in the region to economic stability by 2025.

Strategic Income Priorities	Stable and Affordable Housing	<b>Strategies</b>
		Short-term Supports for Acquiring or Maintaining Stable, Affordable and Quality Housing
		Long-term Supports for Maintaining Stable, Affordable and Quality Housing
		<b>Indicators</b>
		# and % of Individuals Transitioning From Homelessness to Housed Sustaining Safe, Affordable Housing as a Result of Obtaining an Income Source (e.g. housing voucher, employment, SSI, SSDI, public assistance)
		# and % of Individuals Moving from Homelessness to Housed as a result of Receiving Support Services to Obtain Safe, Affordable Housing
		# and % of Households Retaining Stable, Affordable Housing as a Result of Receiving Short-Term Housing Assistance Subsidies (Up to 6 Months)
		# and % of Households Retaining Stable, Affordable Housing as a Result of Receiving Long-Term Housing Assistance
	Workforce and Income Supports for Low-income and Working Individuals	<b>Strategies</b>
		Community-Based Service Supports and/or Referrals for Employment Attainment and Retention
		Credential Attainment for Job Readiness and Advancement
		Financial Literacy, Coaching & Asset Building
		Childcare Assistance for Working Parents/Guardians
		Tax Preparation Assistance for Low-income and Working Individuals
		<b>Indicators</b>
		# and % of Working Individuals Attaining Employment as a Result of Receiving and Utilizing Referrals for Community-based Services to Reduce Employment Barriers
		# and % of Working Individuals Retaining Employment as a Result of Receiving and Utilizing Referrals for Community-based Services to Reduce Employment Barriers
		# and % Individuals Gaining Employment as a Result of Attaining Credentials for Job Readiness
		# and % of Individuals Experiencing an Increase in Wages as a Result of Attaining Credentials for Job Advancement
		# and % of Individuals Experiencing Recorded Gains in Household Income and/or Dollar Value in Net Assets as a Result of Receiving Financial Literacy and/or Coaching Support
# and % of Families/Households Attaining Employment as a Result of Receiving Childcare Assistance		
# and % of Families/Households Retaining Employment as a Result of Receiving Childcare Assistance		
# and % of Individuals with an Eligible Income Utilizing Free Income Tax Assistance Services who Qualified for and Received Earned Income Tax Credit		
# and % of Individuals with an Eligible Income Utilizing Free Income Tax Assistance Services who Qualified for and Received Property Tax Credit		
# and % of Individuals with an Eligible Income Utilizing Free Income Tax Assistance Services who Qualified for and Received Home Heating Credit		
# and % of Individuals with an Eligible Income Utilizing Free Income Tax Assistance Services who Qualified for and Received Child Tax Credit		

**UWBCKR has a special interest in equity and the reduction of economic and racial disparities in systems and outcomes.**

**Therefore, programmatic elements that intentionally address these issues are encouraged, including but not limited to:**

- Anti-bias training and assessment
- Inclusive supports (e.g. multi-lingual service provision, non-traditional communication methods, equitable representation)
- Neighborhood-based programming in high-need areas
- Address structural and institutional policies & practices creating inequities in housing, career and income opportunities based on factors of race, ethnicity, gender and physical limitations.

**\*Annual Demographic Data to Be Collected By All Funded Partner Agencies and Programs**