



United Way of Lancaster County

LEVEL UP & LAUNCH GRANTS

2023 - 2024

BACKGROUND

This Call for Proposals outlines details for investments in local organizations supporting the pursuit of an equitable and inclusive Lancaster County, where all neighbors can thrive and sustain a dignified quality of life that lasts through generations.

United Way is on a mission to advance the education, economic mobility, and health of our community by mobilizing resources, people, and organizations. We envision an equitable Lancaster County where every individual has an opportunity to succeed, and the entire community thrives as a result.

We understand that community issues are complex. Therefore, we believe in investing in the basic building blocks that every person – and every community – need to thrive: Education, Economic Mobility, Health and Well-being, and Capacity Building needs. We aim to serve individuals who are historically or currently marginalized and/or are suffering from systemic inequities that impede their ability to reach and maintain financial independence through family-sustaining employment.

This grant opportunity seeks to find scalable, and innovative solutions to advance the education, economic mobility, and health of Lancaster County residents via focused Level Up & Launch Grants. These grants are made possible by the donations of thousands of community investors each year, and United Way is committed to serving as a strategic steward of these dollars. We plan to be a contributor to the work; grantees will receive support through the connections and opportunities we bring, including volunteers and other resources, to aid their success.

OPEN CALL FOR PROPOSALS

United Way seeks to invest in scalable and innovative projects in our four priorities that demonstrate an awareness of service gaps and/or systemic challenges. We are encouraging organizations to use data from the recently published Racial Equity Profile of Lancaster County to inform project plans and activities. The data in the Racial Equity Profile can help organizations identify gaps and disparities in resources while suggesting a framework for developing and improving policies.

Education: Improved Children and Youth Success - | Universal Extracurricular Participation, Support Adults with incomplete education | Transportation

Economic Mobility: Achieve economic stability | Attain employment | Develop chosen pathways



to career | Break generational poverty cycles | Support re-entry/recovery employment options | Transportation

Health & Wellness: | Age with dignity | Obtained Care | Transportation

Capacity Building: Diversity, Equity & Inclusion Initiatives | Social Justice | Workforce Development | Transportation

Please note, in addition to awarding grant dollars, UWLC is also offering Capacity Building opportunities to selected grantee organizations in terms of participation in Project Blueprint, and various resources including trainings on Media Relations, Volunteer Opportunities, etc.

OUR COMMITMENT TO EQUITY

Being part of a marginalized group has a big impact on a person's life outcomes, and we can only break the cycle by standing up for equity and justice. That is why UWLC commits to:

- Acknowledging and reconciling our historical role in perpetuating systems of inequality
- Changing inequitable systems that prevent our community from reaching its full potential.
- Embracing diversity, equity, and inclusion as individuals, as an organization, and with our community
- Recognizing that marginalized groups and systems change over time, we may be impacting un-noticed groups today differently than underserved groups yesterday.

As an organization we are always learning and unlearning so that we can improve our practices and our commitment to equity. We aspire to embed diversity, equity, inclusion, accessibility and belonging in everything we do by focusing on individuals, our organization, our interactions with the community we serve, and our stakeholders. In that process, we must pay particular attention to include the voices of those who are marginalized or underrepresented. We are constantly building organizational capacity to engage meaningfully across differences and foster an inclusive culture.

At UWLC, we aim to address inequities and foster inclusion and advancement for underrepresented populations in the communities in which we live and work. We do this because a community that isn't whole and healthy at its margin cannot be whole and healthy for long in its center. ¹Our classification of underrepresented populations includes *individuals who are members of the Black and African-American community as well as Indigenous Persons and People of Color (BIPOC), who have been discriminated in this system on the basis of religion, gender, sexual orientation, national origin, age, disability, poverty(rural & urban), incarcerated & re-entering the community/economy, or any other factor not relevant to a person's eligibility for service, and to advance and thrive in life.*

Our internal board-level Equity Committee is leading us in accomplishing the goals of our own strategic plan, and working to ensure that all our programs and initiatives address the needs of everyone, particularly those who are marginalized and most underrepresented in our communities. Still, we are humbled by the significant work yet to be done. We acknowledge that

¹ We will be referring to this classification of ***underrepresented populations*** hereafter in this RFP announcement document.



we have much to do to become more equitable, inclusive, accessible, and intentional about cultivating belonging in our organization and in the communities we serve.

We seek to partner with others with the same commitment to equity - those who are at the forefront of this work and those who are just beginning their journey. We offer our assistance in creating an equitable nonprofit landscape in our community and ensuring community voice is integral to the work we support.

United Way Worldwide has issued new requirements in the way local UWs allocate community dollars. In order to receive funding, agencies must agree to meet these specific equity expectations:

1. Provide disaggregated program data.
2. Complete an equity audit (or submit if already completed).
3. Invest in equity training for staff (or provide evidence of completion or a plan within one year).

We are prepared to provide technical assistance to organizations for item 1 and financially support organizations to complete items 2 and/or 3.

MATCH FUNDS: HOW DOES IT WORK?

United Way is committed to investing a total of \$500,000 in this work in the form of short-term grants and backbone support. Our initial grant of \$250,000 will be awarded to organizations in amounts ranging from \$10,000 - \$50,000, which will be eligible for matching funds. A unique feature of this grant opportunity is the ability to leverage funds. While it is common for grants to require pre-designated matching funds, our initial grant amount **does not** require this match, as we hope to promote engagement with the community through fundraising. In addition, we acknowledge that some organizations may be discouraged in applying because they lack the financial capacity to match funds.

UWLC is proud to offer this grant as a low-barrier access to funds that can transform the community. These donations will build sustainability into your projects and provide scalable successes. We will match each organization’s fundraising outcomes dollar-for-dollar up to the initial grant amount funded.

\$15,000 Level Up and Launch Grant from United Way will be paid out in full immediately		
	+	
Through November 10, 2023, you can raise up-to \$15,000 match eligible dollars*		
	+	
United Way matches dollar for dollar up-to the original \$15,000. (Distributed monthly)		
	=	
\$45,000 total amount for your project at a ratio of 2:1 United Way to your own funding		

LOGIC MODEL: HOW DOES IT HELP?

Grantees are requested to submit the Logic Model for programs they are planning to implement if they receive Level Up & Launch grants.

A logic model is a systematic and visual way to present and share your understanding of the relationships among the resources you have to operate your program, the activities you plan to do, and the changes or results you hope to achieve.

It is a tool to help you think critically about your program and present how your program will lead to results, as well as determine the specific pathway that your program deals with, and creating a neat, orderly structure for it. In other words, it gives a detailed description of the program showing how the program activities will lead to the immediate outputs, and how these will lead to the outcomes and goal (the terminology used varies by organization).

This graphical representation of your program will help for you and UWLC to monitor program implementation.

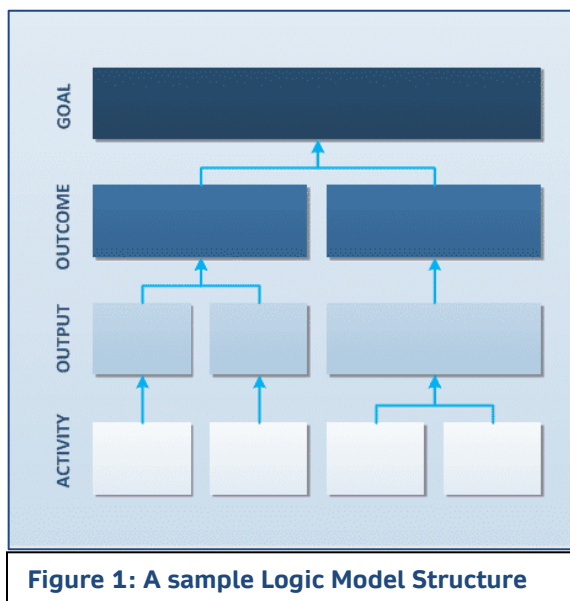


Figure 1: A sample Logic Model Structure

PRIORITY I: EDUCATION

Success in life begins with a quality education. It is the foundation of success for individuals and the community. A quality education, starting with access to early-learning experiences and continuing through post-secondary education, is essential in paving a path to increased opportunity in an individual's lifetime. United Way works with schools, parents, care providers and other community partners to ensure that every child gets a strong start in life, teenagers have the tools to learn and grow, and young adults thrive in their lives.

An equity lens in education shifts the focus from individual experiences to one placing stronger responsibility on the structures, institutions, policies and practices, that have contributed to current unequal conditions. Educational equity is achieved when outcomes (high school graduation, college attainment) are no longer closely correlated with a student's race, income level, gender, ability status, or locality.

According to the recently published Lancaster County Racial Equity Profile, about 35 percent of students in Lancaster County are people of color, but only four percent of their teachers are people of color. Similarly, recent research conducted at the University of North Carolina at Chapel Hill shows that Black students who have at least one Black teacher in elementary school are less



likely to drop out of high school and more likely to attend college.²Therefore, we believe that access to quality education, diverse educators, and supportive afterschool programs are elements that nurture the growth of our children.

United Way of Lancaster County supports programs/initiatives providing access to quality education for children, ranging from pre-k to 12th grade, as well as those that support secondary education and specialized skills / trade schools.

Applicants should describe how their work helps achieve one or more of the goals listed below, which have been pulled from An Equity Profile of Lancaster County. The work should align with one or more of the strategies listed below, and applicants must be able to report on one or more of the measures listed below.

Goal: Lancaster County’s children and youth have access to quality education, so they gain the knowledge, skills, and credentials to be successful in their lives with opportunities that support the upward mobility.

Strategies:

- Increase access to high-quality early childhood educational experiences for children (especially from underrepresented populations in the community) to support school readiness.
- Engage families, youth, schools, and community partners to ensure that students (especially from underrepresented populations in the community) have access to K-12 high-quality, high-performing schools.
- Partner with schools, especially those serving high-poverty and/or majority students of color, to provide support for after school programs and bring diverse educators on the staff.
- Partner with schools and trusted faith/community-based organizations to engage students and families of color to understand their needs and challenges.
- Provide families and caregivers with information/resources/networks to support their child’s academic success.
- Partner with higher education and state teacher licensure departments to identify and support policies, practices, and investments to increase the number of BIPOC college students achieving teaching degrees.
- Partner with schools, community-based organizations and other funders to invest in and lead initiatives that improve high school graduation rates for students of color. Both academic and extracurricular activities can be considered.

² [Black students need changes to policies and structures beyond higher education \(insidehighered.com\)](https://www.insidehighered.com/black-students-need-changes-to-policies-and-structures-beyond-higher-education)

- Provide high school and college students (especially those in high-poverty schools and/or in neighborhoods with majority students of color) support and services to ensure college access, persistence, and completion.

Measures:

- Investments in the number of students and families attending schools that are low-performing and/or more than 40 percent qualify for Free and Reduced Meals
- Number of K-12 children and youth (especially from underrepresented populations in the community) who participate in extracurricular activities, afterschool programs, summer programs and/or receive individualized supports for any of these categories.
- Number of youth (especially from underrepresented populations in the community) participating in internships and/or summer jobs or who participate in Career and Technical Education programs.
- Percent and number of children and youth (especially from underrepresented populations in the community) with access to computer software and hardware
- Number of community/state- coalitions or collaboratives focused on promoting quality, equitable K-12 education and high-quality afterschool and summer programs.
- Number of individuals/families (especially from underrepresented populations in the community) with access to transportation to attain the services offered in the community.

If you are proposing a project that does not track one of these measurements, please indicate how your metrics align with one of the community's collectively monitored outcomes: [ALICE](#) | [Places 2040](#) | [Equity Profile of Lancaster County](#) (See Resources section for website addresses)

PRIORITY II: ECONOMIC MOBILITY

Economic Mobility refers to the ability of individuals to improve themselves and their families' economic condition. We believe that having an equitable access to resources and opportunities is the foundation of a prosperous community. Our community will thrive only when all families in our community are financially stable and able to achieve a dignified quality of life. Fewer financial stressors lead to healthier lives, better educational outcomes, and a more productive workforce. The ability to improve one's economic condition is highly correlated to the patterns of discrimination that constrain opportunities and limit choices for some while creating privilege for others. This has resulted in a society with vast economic disparities.

In every community of Lancaster County, individuals and households are facing economic and financial barriers that prevent a good quality of life, and those disparities have been clearly illustrated in Lancaster County's Racial Equity Profile. For example, Black or Latinx members of



our community are twice more likely to be unemployed than white residents; experience childhood poverty at more than triple the rate of white children, earn less than their white coworkers despite an equal level of education. We're striving to put every person in the county on a path toward financial stability and economic success. That starts with equitable access to services like job training, vocational training, career development, and financial education.

At United Way of Lancaster County, we are also cognizant of the multigenerational mobility process. According to the research, intergenerational mobility in socio-economic outcomes, between parents and their offspring, is a process that involves two generations³. United Way is committed towards bringing this systemic change and ensuring that all individuals and/or families can move upwards in their socio-economic status and become economically stable. The Federal Poverty Level (FPL) for a household with two adults and two school-aged children is \$26,246. In Lancaster County in 2020, 9% of households lived at or below the poverty level. However, FPL does not adequately measure the income a family needs to survive in Lancaster County. United Way of Lancaster County, along with United Way Worldwide, advocates for ALICE – Asset Limited, Income Constrained, Employed. ALICE determines the income needed to for a sustainable budget. A household budget - not thriving, just surviving - for that same family of four would require an income of more than \$60,000 per year. More than 26% of families in our county have incomes below a survival budget.

In this Priority Area, we will support programs that help families, especially those who have been historically marginalized, in reaching economic and financial stability - both adults and youth (ages 16-24). Applicants in this category should describe in their proposals how their work helps achieve our overarching goal of economic mobility. The work should align with one or more of the strategies listed below, and applicants must be able to report on one or more of the measures listed below.

Goal: Individuals and families have equitable access and opportunities to improve their socio-economic status.

Strategies:

- Youth and adults (especially from underrepresented populations in the community) have the education, skills, networks, and opportunities to obtain and retain good jobs with pathways for advancement.
- Youth and adults advance (especially from underrepresented populations in the community) to good jobs and careers in high-growth, high-wage sectors.

³ <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4175437/>

- Entrepreneurs (especially from underrepresented populations in the community) have access to capital, network, resources, and opportunities to develop and sustain successful businesses.
- Youth and adults Entrepreneurs (especially from underrepresented populations in the community) have equitable opportunities to use quality and comparable financial products and services.
- Provide parents (especially from underrepresented populations in the community) wrap around support that address the unique barriers parents face when aspiring to advance their own education and career opportunities.
- Equip individuals (especially from underrepresented populations in the community) with the tools and knowledge to access safe and affordable housing & achieve home ownership.
- Ensure equitable business opportunities for BIPOC-owned small businesses.

Measures:

- Number of individuals (especially from underrepresented populations in the community) who access affordable financial products and services (bank accounts, mortgages, consumer and business loans, lines of credit)
- Number of individuals (especially from underrepresented populations in the community) with access to affordable housing (i.e., less than 37 percent of income devoted to housing costs)
- Number of individuals (especially from underrepresented populations in the community) with access to employment opportunities that provides a minimum of living wage.
- Number of individuals participating in programs offering financial coaching/education, credit repair, savings plans
- Number of individuals (especially from underrepresented populations in the community) who access job skills training and land jobs that pay a minimum of living wage.
- Number of individuals/families (especially from underrepresented populations in the community) with access to affordable, quality childcare services
- Number of individuals/families (especially from underrepresented populations in the community) with access to transportation to attain the services offered in the community.
- Number of community/state-based coalitions or collaboratives focused on workforce development and/or job training.



If you are proposing a project that does not track one of these measurements, please indicate how your metrics align with one of the community’s collectively monitored outcomes: [ALICE](#) | [Places 2040](#) | [Equity Profile of Lancaster County](#) (See Resources section for website addresses)

PRIORITY III: HEALTH & WELL-BEING

The health of individuals is a strong indicator of the health of a community. Historically marginalized populations and those living on the economic margins have less access to these systems and are more exposed to environmental hazards. Achieving and maintaining good health is important at each stage of life. To improve the overall health of our community, we connect people to quality and affordable primary, mental, behavioral, dental, and general health care services. Whether it is supporting seniors as they work to age in place or increasing access to preventative health education that helps people sustain or improve their health or that simply promotes healthy living, United Way is working to improve the health of all.

It is imperative to define Social Determinants of Health⁴ to work towards a standardized framework of access and attainment of Health Care in Lancaster County. Social determinants of health (SDOH) are the conditions in the environments where people are born, live, learn, work, play, worship, and age that affect a wide range of health, functioning, and quality-of-life outcomes and risks.

We can achieve equitable outcomes in Health when individuals have the opportunity to attain their full health potential, and no one is left behind from realizing this goal because of their race, income level, gender, locality/residence, or any other socially determined factor. Gaps in access to quality healthcare and disparities in health outcomes correspond directly to historical and ongoing inequities. United Way is working in the community prioritize changes to institutions, policies, and practices to help address these persistent inequities in resources, supports, and opportunities that contribute to gaps in health outcomes.

In this Priority Area, we will support programs that increase access to health-related services. Applicants in this category should describe in their proposals how their work helps achieve our overarching goal of increasing access to health services. The work should align with one or more of the strategies listed below, and applicants must be able to report on one or more of the measures listed below.

Goal: Individuals and families have equitable access healthcare and opportunities to improve their health.

⁴ Healthy People 2030, U.S. Department of Health and Human Services, Office of Disease Prevention and Health Promotion. Retrieved [date graphic was accessed], from <https://health.gov/healthypeople/objectives-and-data/social-determinants-health>

Strategies:

- Promote affordable and comprehensive health insurance enrollment (especially from underrepresented populations in the community) as well as understanding accessibility and attainability of healthcare.
- Remove barriers to access public benefits and health resources.
- Work with community partners to provide increased access to senior services (especially from underrepresented populations in the community)
- Work with community partners and residents to strengthen and build healthy, supportive, resilient communities in areas with poor health outcomes, by addressing the social determinants of health.
- Improve access to and quality of prenatal and postpartum care to women of color, with particular emphasis on Black women.
- Support and expand health services in under-resourced communities, especially low-income rural communities.

Measures:

- Number of individuals (especially from underrepresented populations in the community) participating in physical activity and/or healthy food access/nutrition programs.
- Number of individuals (especially from underrepresented populations in the community) served with access to healthcare services and supports.
- Number of individuals (especially from underrepresented populations in the community) who can obtain healthcare services and supports.
- Number of individuals (especially from underrepresented populations in the community) on the path to healthy lifestyle with increased access to healthy eating and physical activity.
- Percent of mothers (especially from underrepresented populations in the community) who access prenatal care.
- Percent of babies (especially those born in underrepresented populations in the community) who experience healthy birth outcomes (e.g., carried to full term, born at a healthy weight and/or celebrate their first birthday)
- Number of individuals/families (especially from underrepresented populations in the community) with access to transportation to attain the services offered in the community.

If you are proposing a project that does not track one of these measurements, please indicate how your metrics align with one of the community's collectively monitored outcomes: [ALICE](#) | [Places 2040](#) | [Equity Profile of Lancaster County](#) (See Resources section for website addresses)

PRIORITY IV: CAPACITY BUILDING

United Way of Lancaster County wants to ensure that every organization is equipped to uphold the community, fostering, and implementing a mission and vision with equity at its core. As we reflect on what has divided us, it is time to introduce innovation and creative solutions to establish a legacy of resilience and adaptability.

This Priority Area provides applicants a chance to be creative. Capacity building can look different from organization to organization. For one, it may be a move to a local space that will allow neighbors to access services via public transportation. For another, it could be comprehensive training that will increase staff knowledge or hiring expert consultants to analyze current practices while working with organizations to adapt accordingly and expedite their mission.

Some organizations implement creative capacity building and use designated funds to build specialized tools that will allow them to expand their services or automate processes. United Way values organizations that seek opportunities to self-evaluate their operations and identify gaps in their infrastructure where improvements are vital. These gaps can exist in work culture, leadership, technologies, the list is only limited by the bounds of one's own imagination.

Goal: Organizations are equipped with the tools and techniques to sustain and expand their effectiveness within the community.

Strategies:

Organizations can invest in capacity building by adopting one or more of the following strategies.

- Intentionally investing in creating a safe, affirming, and inclusive working environment. Involving neighbors with lived experience in volunteer opportunities such as boards & committees
- Organizing Diversity, Equity & Inclusion training of the staff and board members; Providing tools and accommodations to represent the full diversity of organizational staff.
- Investing in Employee development and empowerment programs while creating & nurturing an organizational culture of sensitivity & support.
- Making a commitment of longevity to staff; Developing trauma-informed programs and affinity groups
- Investing time and resources in performing an exhaustive Organizational Capacity Assessment that will help organizations to perform an in-depth evaluation of their organizational policies, structure, operations, and values.
- Work on Establishing meaningful connections with the local community; Intentionally



build a pipeline for underrepresented communities to ensure diverse talent has an awareness of and access to the employment opportunities.

Measure:

- Evidence-based solutions that increase the organizational reach of outcome driven local community organizations.
- Identify how capacity grant will lead to greater ability to measure or track organization’s progress in the future.

If you are proposing a project that does not track one of these measurements, please indicate how your metrics align with one of the community’s collectively monitored outcomes: [ALICE](#) | [Places 2040](#) | [Equity Profile of Lancaster County](#) (See Resources section for website addresses)

RESOURCE WEBSITES:

- ALICE: <https://www.unitedforalice.org/indicators/pennsylvania>
- Lancaster County Racial Equity Profile: www.equityprofilelancaster.com
- Places 2040: <https://lancastercountypanning.org/>

GRANT PROCESS TIMELINE* (2023-24)

February 10, 2023	RFP announcement and Application Released
March 17, 2023	Applications due at 5:00 pm
April 14, 2023	UWLC Board Reviews Applications & Determines Awards based on a scoring system
April 17, 2023– May 5, 2023	In Person Grant Presentations for Finalists
May 15, 2023	Grant Award Announcements
May 16, 2023	Grant and Fundraising Match Term Begins
June 1, 2023	Initial Grant Dollars Distributed and Fellowship Support begins
November 10, 2023	Conclusion of Fundraising Match Period
Week of January 15, 2024	Mid-Year Report and Presentations to United Way Board
June 30, 2024	Conclusion of Fellowship Support
July 31, 2024	Final Report Due

* In addition to these dates, awardee organizations receive invitation to Project Blueprint Organizational Cohort, Volunteer opportunities, marketing and communication support, and regular check-in meetings which will require to be determined (TBD) scheduling dates.

HOW TO APPLY

Applications are submitted online via Survey Monkey. The link can be found on our website.

Applications must include the following information:

- Application Answers
- Program Budget (see Attachment A)
- IRS Nonprofit Determination Letter (see Attachment B)
- Board of Directors Roster
- Organizational Budget (current Fiscal Year)
- Due Diligence Documentation
 - All applicants must submit a completed Assurances Checklist (see Attachment C for the Assurances Checklist form you will complete and upload)
 - Organizations with an annual budget of more than \$500,000 must also submit their most recent audit.
- Logo, Headshot of Chief Personnel Officer (Executive Director, CEO, etc.)
- United Way of Lancaster County's Nonprofit Needs Assessment – *This is not required at this initial stage to apply for this grant. However, as we work to better understand the needs and capacity of the nonprofit sector in our community, we are requesting any applicant to consider completing this survey.*

Please note that our previous grantees of United Way support (EFSP, EITC, etc.) are eligible to apply. Last year's Level Up and Launch grantees **MUST** apply for a different project, or expansion of their project in collaboration with another organization.

SELECTION PROCESS

United Way staff members will initially review each application to determine if the applicant is eligible and if the application is complete. Complete applications that meet the eligibility criteria will move on to a more thorough review process. A select group of community members will evaluate the applications using a scoring rubric. Once the reviews are complete, reports will be created based on application scores as well as diversity across services provided, communities served, organization leadership, and other factors. Recommendations based on these reports will go before the entire United Way Collective Impact Committee (CIC) for approval. The United Way CIC is a diverse group of community leaders and issue area experts who will approve the final recommendation that is presented to the United Way Board of Directors for approval.

EXPECTATIONS

The Level Up & Launch Fellows agree to:

- Regularly attending monthly United Way-facilitated meetings
- Ensuring the appropriate staff members receive United Way communications.
- Provide pertinent data in a timely manner.
- Work with United Way's marketing team to publicize and highlight the initiative.
- Maintain an up-to-date organization profile on PA211 and Get Connected volunteer portal websites.



- Identify at least one staff member for enrollment in the 211 Referral Tracker solution to receive referrals through other partners and 211 more directly.

REPORTING

United Way Level Up & Launch Grant recipients help advance the work of our community goals by supporting data collection on services provided. This includes reporting on the activities funded by this grant opportunity. Funding is not contingent on meeting specific targets. Reporting is for informational purposes. Grantees will report common metrics based on their approved grant on a monthly basis. These metrics can vary depending on the type of work done, but include:

- Number of United Way meetings attended.
- Number of individuals served/enrolled.
- Disaggregated demographic information on those served/enrolled in funded programming. If there is a reason this information is difficult/impossible to collect, organizations should contact United Way to explain.
 - Race/ethnicity
 - Age
 - Disability
 - Gender
 - Sexual orientation
 - Income level
- Amount of additional funds leveraged to conduct your work.
- We also ask grantees to share if there has been any significant changes to their work each quarter and provide qualitative responses to questions about successes, challenges, and community conditions.

QUESTIONS

All questions should be submitted in writing to grants@uwlanc.org.

APPENDICES

- Attachment A – Sample Program Budget
- Attachment B – Sample IRS Nonprofit Determination Letter
- Attachment C – Assurances Checklist form



Attachment A: Budget Template

Below is an example budget and narrative.

Example Program Budget Template:

Organization Name:	Example Organization
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Program/Project Name:	Adult ESL Instruction
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	Expense Category	United Way Request	Total Program Budget
1	Salaries/Wages	\$ 32,500.00	\$ 220,000.00
2	Benefits/Taxes	\$ 9,750.00	\$ 66,000.00
3	Supplies	\$ 5,000.00	\$ 15,000.00
4	Subaward	\$ 10,000.00	\$ 30,000.00
5			
6			
7			
8			
9			
10			
11			
25			
26			
27			
28			
29			
30			
	<i>Total Direct Costs</i>	\$ 57,250.00	\$ 331,000.00
	Indirect/Overhead/Admin Rate (up to 30%)	30.00%	30.00%
	Indirects	\$ 17,175.00	\$ 99,300.00
	Total	\$ 74,425.00	\$ 430,300.00

% Funded By United Way	17.30%
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	With United Way Funds	Total Served By Program
Number Served	10	40
Cost Per Client	\$ 7,442.50	\$ 10,757.50



Example Budget Narrative:

Organization Name:		Example Organization
Program/Project Name:		Adult ESL Instruction
	Expense Category	Expense Description
1	Salaries/Wages	Requested funding for 50% ESL instructor. Entire program includes 2 FTE ESL instructors, 1 FTE case manager, and 0.5 FTE program manager
2	Benefits/Taxes	30% of salaries including taxes, health benefits, and cell phone reimbursement
3	Supplies	\$5,000 per class of 20 students for curriculum license, student access to online platform, books, etc.
4	Subaward	We partner with Example Child Care Center to provide on-site child care for students for up to 20 hours per week. \$10,000 serves 20 students.

Attachment B: IRS Determination Letter

The IRS determination letter should look similar to the one below (name of organization and EIN redacted in the example).

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUN 03 2014

Employer Identification Number:

DLN:

Contact Person:

CUSTOMER SERVICE

Contact Telephone Number:

(877) 829-5500

Accounting Period Ending:

December 31

Public Charity Status:

509(a)(2)

Form 990 Required:

Yes

Effective Date of Exemption:

May 9, 2012

Contribution Deductibility:

Yes

Addendum Applies:

No

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. We determined that you are a public charity under the Code section(s) listed in the heading of this letter.

Attachment C: Assurances Checklist



ASSURANCES CHECKLIST

I certify that _____, the organization represented in this proposal, meets the following criteria or has provided reasonable alternative methods to meet standards. I understand this document must be signed by two representatives of the organization.¹

Staff Leadership (such as CEO/President/ED)

Signature

Printed Name

Date

Board of Directors Leadership (Chair/President)

Signature

Printed Name

Date

Mark if Yes	Criteria	Comments if No
<input type="checkbox"/>	The size of the board is sufficient to carry out current and long-range plans.	
<input type="checkbox"/>	The board meets regularly and has an active committee structure.	
<input type="checkbox"/>	The board participates in fundraising or revenue generating activities on behalf of the organization.	
<input type="checkbox"/>	The board members have specific terms and new members are recruited periodically.	
<input type="checkbox"/>	The board has a process to review program performance.	
<input type="checkbox"/>	The board annually approves the budget and regularly reviews financial performance information.	
<input type="checkbox"/>	The board has a strategic plan; monitors performance; and updates the plan as necessary.	
<input type="checkbox"/>	The board is representative of the community served.	
<input type="checkbox"/>	Management, general and fundraising costs are reasonable.	
<input type="checkbox"/>	The organization has written personnel, operating, and financial management policies.	
<input type="checkbox"/>	Staff and general volunteers are representative of the community served.	
<input type="checkbox"/>	Organization has sufficient capital to maintain operations over the course of the grant term.	
<input type="checkbox"/>	Organization has internal controls in place to manage expenditure of these grant funds and maintain appropriate financial records.	
<input type="checkbox"/>	Organization has a system for measuring outputs, outcomes (if possible), and client demographics of those served with All Together ATX funds.	
<input type="checkbox"/>	Organization is not delinquent on any state or federal debt.	

¹ If your organization staff leader (CEO/ED/President) is also the president/chair of the board, one signature is sufficient. If your organization does not have paid staff, one signature from the president/chair of the board is sufficient.