



UNITED WAY *of* GREATER LOS ANGELES

**FINANCIAL STABILITY
REQUEST FOR PROPOSAL**

Due: April 9, 2013

“Pathways Out of Poverty”: United Way’s Mission

United Way of Greater Los Angeles is committed to improving the quality of life for all in Greater Los Angeles by creating pathways out of poverty for those in need. In order to create these “pathways,” we give voice to the issues through research and advocacy, bring together community leaders to provide solutions, and engage organizations through our funding to create measurable impact.

United Way Financial Stability Overview

United Way works proactively to prevent poverty by ensuring that low-income individuals and families have the income, skills, and resources necessary to meet basic needs, weather financial emergencies, and start on a path to upward mobility. Through workforce development and asset building services, United Way and its partners have helped thousands of families in Los Angeles improve their financial status and prepare for a secure and prosperous future. Our Financial Stability work for 2013-2015 will focus on:

1. Workforce Development Services for Post-9/11 Veterans

One of the most important components of successful veteran reintegration into civilian life is steady employment. Research shows that many post-9/11 veterans returning to LA County are not prepared to be competitive in our labor market and are experiencing alarmingly high rates of unemployment and underemployment. In November 2012, United Way released “Helping Our Heroes: Creating Pathways to Veteran Employment” and committed to reducing post-9/11 veteran unemployment 50% by placing 5,400 veterans in jobs by 2017.

2. Asset Building Services for Low-Income Families in Neighborhoods Immediately Surrounding Academically Struggling Middle Schools. Research shows that children growing up in neighborhoods with high levels of poverty and unemployment are much less likely to graduate from high school. The disruptions and distractions caused by financial strains in the home can often contribute to students’ poor academic performance. In support of our work in education, United Way is committed to, by 2017, increasing the financial stability of 75% of the low-income families in neighborhoods immediately surrounding academically struggling middle schools.

General Information

United Way invites qualified nonprofit organizations to apply for funding consideration in one of the two funding priorities outlined above.

Grants are for general operating support, and applicants may apply for up to two (2) years of support. Grant amounts in the second year are renewable based on performance and United Way's successful workplace fundraising campaigns. Total funding for the two-year grant cycle will not exceed \$150,000.

Applicants may request no less than \$25,000 and no more than \$75,000 per action area per year. Although \$75,000 is the maximum that can be requested per action area per year, additional funding may be awarded in certain circumstances for organizations serving multiple geographies in Los Angeles County.

Applications are due by Tuesday, April 9, 2013 at 5:00pm through United Way's online portal. To access the online portal, please go to <http://www.cybergrants.com/unitedwayla/quiz> to begin the application process.

No faxed, e-mailed, hand delivered, or late applications will be accepted. There will be no exceptions.

Organizations will be notified by July 31, 2013 regarding the outcome of their application.

Strategies We Seek to Support

Organizations are invited to submit proposals for either one of the two Financial Stability funding priorities:

- Workforce Development for Post-9/11 Veterans
- Asset Building

Only one Financial Stability proposal per organization will be accepted and reviewed.

Workforce Development for Post-9/11 Veterans

Workforce development services eligible for funding include, but are not limited to, the following:

- Case management focused on job readiness skills. This may include assistance with completing a job application, translating military experience into a civilian resume, mock interviews, and guidance on office protocol.
- Job placement assistance.
- A minimum of 6 months of retention support for veterans that obtain employment.
- Maintaining working relationships with employers and providing retention services, as needed.
- Collaboration with other veteran serving organizations to coordinate comprehensive and efficient services.
- Outreach to post-9/11 veterans.

Funding priority will be given to organizations that have a history of strong relationships with local employers and the ability to work in collaboration with veteran serving organizations.

Asset Building

Asset building services eligible for funding include, but are not limited to, the following:

- Delivering services in neighborhoods immediately surrounding academically struggling middle schools*
- Intensive case management services that promote financial stability, as measured by one or more of the following:
 - a. Reduced debt
 - b. Improved credit score
 - c. Lowered rate of delinquent bills
 - d. Contribution to savings

- e. Move from unbanked (no bank account) or underbanked (use of check cashing/predatory lending services) to the establishment of an account with a mainstream financial institution
- f. Self-reported improved financial stability as a result of services such as financial literacy classes, budgeting assistance, one-on-one financial coaching, etc.
- Administering a Volunteer Income Tax Assistance (VITA) site OR hosting a VITA event

Funding priority will be given to those organizations serving neighborhoods immediately surrounding Hollenbeck Middle School (MS), Mt. Gleason MS, Northridge MS, Van Nuys MS, Daniel Webster MS, El Sereno MS, and Irving MS.

*Schools that are in years 3, 4 or 5 of being in Program Improvement Status as defined in federal regulations. (As part of the No Child Left Behind Act, the California Department of Education has identified the Title I schools listed below as Program Improvement (PI) based on the school not meeting AYP targets for two consecutive years. CA schools in PI can be found at <http://www.cde.ca.gov/ta/ac/ay/tidatafiles.asp>). The neighborhood(s), including the name of academically struggling middle school(s) to be served must be specified by applicant.

Applicant Organizations Should Demonstrate the Following:

- Successful track record in workforce development or asset building services in low-income communities.
- Ability to leverage additional funding, resources, and linkages to successfully execute the proposed program.
- Effective organizational performance, management, and operational oversight.
- Ability to measure program results.

Narrative Instructions

A. Summary (500 characters maximum)

Describe your program the way that you would like it to appear in United Way public documents and on our website.

B. Proposed Scope of Work (10,000 characters maximum)

For workforce development projects, address each of the following:

- Specify your program's target population(s) and geography to be served.
- Describe the strategy to outreach to post-9/11 veterans.
- Describe your organization's experience providing workforce development services to veterans.
- Describe your program's case management, career planning/counseling, and job placement services.
- Describe the length and scope of follow-up case management/coaching after employment.
- Describe any known barriers to employment for post-9/11 veterans and how your program will address them.
- Describe how your program will engage employers and, if applicable, specify existing relationships with local employers.
- Describe how your organization has worked collaboratively with other non-profit organizations (e.g., initiative partnerships, service organization coalitions).
- Describe your efforts to ensure referrals made to your clients for outside services (e.g., housing, mental health) are effective.

For asset building projects, address each of the following:

- Specify your program's target neighborhood(s), including the names of the academically struggling middle school(s) in those neighborhoods*.
- Describe the strategy to outreach to and recruit low-income residents of your target neighborhood(s) to participate in asset building programs.
- Specify the asset building services offered by your program.
- Specify financial education topics covered by your program, including the curriculum source.
- Describe how your program will develop case management plans.
- Describe how your organization will track client progress toward financial stability.
- If your organization will run a VITA program, please describe the scope and breadth of the program. If not, please describe your efforts to host a VITA event.

* Schools that are in years 3, 4 or 5 of being in Program Improvement Status as defined in federal regulations (as part of the No Child Left Behind Act, the California Department of Education has identified the Title I schools listed below as Program Improvement (PI) based on the school not meeting AYP targets for two consecutive years. CA schools in PI can be found here: <http://www.cde.ca.gov/ta/ac/ay/tidatafiles.asp>).

C. Process Objectives and Outcomes

Each applicant should complete the objectives and outcomes listed below. **Organizations must utilize all of the objectives and outcomes that pertain to the program category for which you are applying for funding. Objectives and outcomes should be developed for a 12-month period.**

Workforce Development

1. **Objective:** XX post-9/11 veterans will receive job readiness training and employment supports.
Outcome: XX will obtain employment.
2. **Objective:** XX post-9/11 veterans will receive job retention support for at least 6 months.
Outcome: XX will retain their job for at least 6 months.

Asset Building

1. **Objective:** XX low-income individuals/families in target neighborhood(s) will receive financial stability services.
Outcome: XX will demonstrate improved financial stability, as self-reported or through metrics approved by United Way.

D. Organizational Capacity and Expertise (2,000 characters maximum)

Discuss your success in the program area for which you are applying, including the organization's experience and track record with the target population in workforce development or asset building. Describe the skills and diversity of staff responsible for the program. If this is a collaborative effort, please describe the specific roles each partner organization plays.

Below are examples of scopes of work for levels of grant requests. These benchmarks are only intended to give a broad idea of the work expected each year for the grant amounts requested.

	\$75,000	\$50,000	\$25,000
Track Record (All Funding Areas)	Extensive track record, experience and innovation in workforce development for veterans or asset building.	Solid experience in workforce development or asset building.	Some experience in workforce development or asset building.
Workforce Development Providers	<p>75-100 post-9/11 veterans will obtain employment and receive a minimum of 6 months of retention services.</p> <p>Organization has a long history of working collaboratively with other non-profit organizations.</p> <p>Organization has established relationships with local employers in a variety of industries.</p>	<p>50-75 post-9/11 veterans will obtain employment and receive a minimum of 6 months of retention services.</p> <p>Organization has a history of working collaboratively with other non-profit organizations.</p> <p>Organization has relationships with several employers in a single industry.</p>	<p>Up to 50 post-9/11 veterans will obtain employment and receive a minimum of 6 months of retention services.</p> <p>Organization has a history of working collaboratively with other non-profit organizations.</p> <p>Organization has employer relationships.</p>
Asset Building Providers	<p>100-130 low-income individuals/families will improve their financial stability, as self-reported or through metrics approved by United Way.</p> <p>Organization has a history of successfully providing financial stability services to a targeted neighborhood, including parents of school-aged children.</p> <p>Organization will run a VITA site during tax season.</p>	<p>70-100 low-income individuals/families will improve their financial stability, as self-reported or through metrics approved by United Way.</p> <p>Organization has a history of successfully providing financial stability services to parents of school-aged children.</p> <p>Organization will host a VITA event during tax season.</p>	<p>Up to 70 low-income individuals/families will improve their financial stability, as self-reported or through metrics approved by United Way.</p> <p>Organization has a history of successfully providing financial stability services to low-income individuals.</p>

Funding Considerations and Limits

- Funding is available to organizations that are exempt under Section 501(c)(3) of the Internal Revenue Code and are classified as “not a private foundation” under Section 509(a).
- Public sector entities are not eligible for funding.
- Organizations must operate within Los Angeles County. If the parent organization is located outside of the county, the applicant must be able to demonstrate the ability to operate within Los Angeles County.
- Funding priority is to serve students in traditional public schools.
- Organizations that discriminate on the basis of ethnicity, race, color, creed, religion, gender, national origin, age, disability, marital status, sexual orientation, gender identity, or any veteran's status will not be funded.
- Organizations may apply jointly as a collaborative.
- United Way does not promise or guarantee a consistent funding level throughout the two-year grant period. Annual renewal of a grant, or any new grant to the Partner Organization by United Way, shall be at United Way’s sole discretion. Any failure of a funded Partner Organization to comply with any conditions set forth in the grant agreement may result in a loss or suspension of funding. In addition, funding levels are subject to modification based on United Way’s fundraising success.

Required Attachments

- Memorandums of Understanding for partnerships or collaborations, if applicable
- Most recent financial statements
- Most recently fully completed audit (if applicable)
- Most recently submitted IRS Form 990
- IRS determination letter of 501(c)(3) status
- Copy of current organizational budget
- Copy of non-discrimination policy
- Current list of public sector, corporate, and foundation grants related to the program for which you are applying for funds

Review Process

All proposals will receive an initial review for general fit within the guidelines and to ensure the proposal is complete. The proposals will then be reviewed and scored by a panel of experts who will evaluate and score proposals based on the criteria outlined in this RFP.

Informational Sessions

You are encouraged to attend one of the information sessions where United Way staff will answer specific questions about the RFP.

Please visit our website at www.unitedwayla.org for more information, updates, and a list of frequently asked questions. You may also send questions to rfp@unitedwayla.org or call our dedicated RFP Hotline at 213-808-6380.