

# United Way Venture Fund FY19 Request for Proposals

# LIVE UNITED



<b>Introduction</b>	<b>2</b>
<b>Process and Timeline</b>	<b>3</b>
Logistics	3
Selection Criteria	4
Additional Support for Grantees	5
Reporting Requirements	5
<b>Application</b>	<b>5</b>
The Problem and the Solution	5
Key Players	6
Year 1 Implementation	6
Long Term Plans	7

## Introduction

The Stanford Social Innovation Review defines social innovation as “the process of inventing, securing support for, and implementing novel solutions to social needs and problems.”<sup>1</sup> Through a competitive, juried selection process, United Way of Massachusetts Bay and Merrimack Valley (United Way) will fund the early stage implementation of solutions that are likely to replace less effective practices that are currently in use and/or remove systemic barriers to making significant progress toward our impact goals.

Through this process, United Way will make one-year grants to a portfolio of nonprofit organizations within [our service area](#) that have the experience, community presence, and relationships to approach a big problem in a new way, as well as a long-term vision for how their approach will result in change that can be measured at the population level in their community.

United Way’s mission is to unite to create positive, lasting change for people in need. In doing so, we focus on two foundations of better lives: Financial Opportunity and Educational Success. Our impact goals in these two areas, which we work to achieve through a combination of strategic grantmaking, public policy and advocacy, and other initiatives, are the following:

Financial Opportunity	Educational Success
<ul style="list-style-type: none"><li>● All individuals and families have safe, permanent, affordable housing</li><li>● All adults have jobs that allow them to support themselves and their families</li><li>● All individuals are able to meet their basic needs and achieve a state of financial wellbeing</li></ul>	<ul style="list-style-type: none"><li>● All children enter kindergarten ready to learn</li><li>● All youth graduate from high school ready to succeed in college and/or careers</li></ul>

In releasing this RFP, United Way’s goal is to select up to 8 finalists to present their approach at an event in early May, 2019. Of those presenting finalists, we intend to select up to 4 organizations to receive one-year grants of up to \$75,000 each. We intend for this seed funding to be used by grantees to leverage additional funds to continue to develop and scale their solutions beyond this one-year grant cycle.

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<sup>1</sup> Phills, J. A. Jr., Deiglmeier, K., & Miller, D. T. (2008). Rediscovering Social Innovation. *Stanford Social Innovation Review*. Volume 6 (4).

## Process and Timeline

The following timeline will guide the application and selection process, as well as the grant cycle itself:

Date	Item
Jan 4, 2019	United Way releases RFP
Jan 25, 2019	Intent to Apply forms are due
Mar 1, 2019	Proposals are due
Early Apr, 2019	Finalists announced
Early May, 2019	Finalists pitch their proposals in person to panelists at an event in Boston
Late spring, 2019	Grantees are announced at a United Way event celebrating innovation in our region
June 1, 2019	12 month grant cycle begins
Monthly	Status update report and check in with United Way
May 31, 2020	12 month grant cycle ends
June 30, 2020	Final report due

### ***Logistics***

In order to apply for funding, an organization must complete and submit an [Intent to Apply form](#)<sup>2</sup> to United Way by January 25, 2019. This will allow United Way staff to recruit a sufficient number of volunteer reviewers to support the selection process, as well as provide applicants with access to our online grant management system, eCImpact.

All proposals must be completed and submitted electronically via eCImpact by **5:00 p.m. on Friday, March 1, 2019**. United Way will not consider proposals submitted after the deadline, via email or means other than eCImpact, or without all required attachments. Only one application per organization and per collaborative may be submitted.

United Way will host orientation webinars for agency staff to provide an overview of the fund, as well as training in using eCImpact on the following dates:

- January 31, 2019 at 1:30 - 2:30 p.m.
- February 1, 2019 at 9:30 - 10:30 a.m.

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<sup>2</sup> The url for the Intent to Apply form is: <https://tinyurl.com/y9yuw8du>

Invitations that include instructions for accessing these webinars will be emailed to designated agency contacts on January 28, 2019. Please only attend one of the scheduled webinars, as the content of each session will be identical. The training will be recorded and sent to all invited agency contacts as a reference and in the event that you are not able to attend.

If you need technical support or have content-related questions while completing the application, please contact [CIHelpDesk@supportunitedway.org](mailto:CIHelpDesk@supportunitedway.org) for assistance.

### ***Selection Criteria***

United Way will award funding to existing nonprofit organizations with 501(c)3 designations within our service area that collaborate with other nonprofits, government agencies, businesses, and/or civic associations to launch an innovative approach to achieving one of our five impact goals within our [service area](#) of 153 cities and towns<sup>3</sup>. While such innovative solutions might make use of a policy lever or a technological advancement, United Way prefers to fund those that are primarily programmatic in nature. Only one application per organization and one application per collaborative will be considered. Proposals must be submitted by a designated lead organization on behalf of all of the partners involved in launching the new approach. Our goal is that this portfolio of grantees will be representative of the geographic diversity of our service area as well as the racial, ethnic, and gender demographics of its residents.

United Way's grantmaking process is a critical time to rally our community together in order to carry out our mission of uniting to create positive, lasting change. It presents an opportunity for volunteers in our community to learn more about the work that we do together and for our staff to gather feedback from many perspectives. In order to make award decisions that will yield the greatest benefit to our community as a whole, United Way engages dozens of volunteer reviewers who represent diverse backgrounds, hometowns, experiences, and professions.

These reviewers will assess proposals on the following criteria:

- **Originality**-- is the proposed solution a novel idea and does it address a significant barrier to achieving United Way's impact goals?
- **Track record of achievement**-- does the applicant demonstrate a history of providing high quality services and empowering communities within United Way's service area?
- **Effective collaboration**-- do the partners named in the proposal have a history of successfully working together to achieve a shared goal?
- **Cross-sector partnerships**-- does the proposed solution leverage the interests and resources of stakeholders outside of the nonprofit sector (e.g. businesses, government agencies, schools and other municipal entities, civic associations)?
- **Response to community need**-- does the applicant address the unique needs of their community and incorporate client feedback into their solution design?
- **Data-informed**-- does the applicant use data to define the problem they are attempting to solve, design their solution, and monitor their performance in achieving measurable outcomes?

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<sup>3</sup> Please see the Service Area page of our website: <http://unitedwaymassbay.org/our-impact/service-area/>

- **Feasibility**-- does the applicant's proposal include a staffing model, management plan, budget that includes additional funding sources, and other necessary resources that will result in the desired year one outcomes by the end of the one-year grant period?
- **Long-term vision**-- does the applicant demonstrate how this proposed approach will lead to measurable change at the population level in their community over the next decade?

United Way volunteers assess whether applicants meet these selection criteria based on the descriptions of the solutions they provide in their proposals. United Way staff then use volunteers' assessments to select finalists to invite to pitch their proposals to a panel of staff and guest judges. This panel will make grant award recommendations, which are subject to approval by United Way's board and its committees.

### ***Additional Support for Grantees***

United Way understands that grant funding is not the only type of support necessary to get a new idea off the ground. We intend to provide technical assistance and a sounding board for problem solving to grantees of this fund through our staff and extended network of corporate partners, volunteers, and peers in the social sector. In this pilot year, we hope that grantees will co-create this model of support with us in order to ensure that the right people are plugging in at the right time in order to maximize the impact of these new approaches in our community.

### ***Reporting Requirements***

At United Way, we know that trying a new approach for the first time is unlikely to work exactly as it has been designed on paper. We expect that grantees may need to pivot over the course of the grant period in order to achieve their goals and remain on track to solve the problem they've identified in their community. In order to support this culture of continuous improvement and learning, reporting for this grant period will consist of monthly check ins with United Way staff and potentially volunteer mentors, as well a final report that details progress toward year 1 goals, what worked well and what did not, additional resources raised to support this endeavor, how the long term vision for solving the problem might have changed, and plans for the year ahead.

## **Application**

### ***The Problem and the Solution***

1. What is the problem that your proposal attempts to solve? In your response, please describe the extent of this problem, the population(s) it most directly impacts, and the longer term effects of this problem in discrete, quantitative terms.
2. In which of the following [regions](#) do you propose to launch programmatic efforts to address this problem over the next year? Please check all that apply:
  - Greater Attleboro/Taunton

- Greater Boston
  - Greater Seacoast
  - Merrimack Valley
  - North Shore
  - South Shore
3. Which of United Way's five impact goals will your solution advance?
    - All individuals and families have safe, permanent, affordable housing
    - All adults have jobs that allow them to support themselves and their families
    - All individuals are able to meet their basic needs and achieve a state of financial wellbeing
    - All children enter kindergarten ready to learn
    - All youth graduate from high school ready to succeed in college and/or careers
  4. What is your proposed approach to solving this problem? Who is the target population, how will it work, how will it lead to results at the population level, and what is the timeframe for seeing those results?
  5. What is the origin story of this solution? On what research and experience is it based and who was involved in designing it? Please specify how the target population has been involved in your response.
  6. What makes this proposed approach novel and an improvement over other models that currently exist to serve this population?

### ***Key Players***

7. Please list the key partners (i.e. nonprofits, businesses, government agencies, schools, civic associations) involved in making this approach possible as well as their role in the model. A bulleted list is preferred.
8. What have these key partners achieved in collaboration together in the past and what aspects of that experience will support a successful launch of your proposed approach?

### ***Year 1 Implementation***

9. What are the best outcomes to indicate that this approach is working by the end of Year 1 (these will likely be process-oriented, e.g. program is fully staffed and has 50 clients enrolled)? A bulleted list is preferred.
10. What challenges do you foresee in achieving these outcomes over the course of the 12-month grant period and what actions might you take to surmount them? Please include any technical assistance or support in-kind from United Way, its partners, and its volunteers that might be helpful.

### ***Long Term Plans***

11. What are the client-level outcomes that you expect to achieve in subsequent years (e.g. 75% of enrolled clients improve their credit scores by at least 30 points within 6 months) and how will you monitor them? A bulleted list is preferred.
  
12. What will it take in terms of resources and systems change to achieve your long term goal of solving this problem throughout your community? Please describe any plans that you currently have to obtain some of these additional resources over the next year.

### **Required attachments for all applicants:**

- Program logic model
- Project management plan (use template provided—download from eCImpact)
- Budget (use template provided—download from eCImpact)
- Letter(s) of support from key partner(s)

### **Required attachments for applicants that are not current United Way Strategic or Lead Partners:**

- 501c3 designation letter
- Most recent audited financial statements
- Board roster