



United Way of Massachusetts Bay's

# Application

# Frequently Asked Questions



**United Way of  
Massachusetts Bay**

## Application Part I: All Applicants

### Organizational Information

1. Organization Legal Name
2. Organization Preferred Name (if different)
3. 501c3 Nonprofit Identification Number
  - If applying through a fiscal sponsor, name the fiscal sponsor and the duration of the agreement.
4. Mailing Address
5. Phone
6. Website
7. Social Media Account(s)

### Application Contact (Primary)

8. Full Name
9. Title
10. Email
11. Phone (if different)

### Executive Director

12. Full Name
13. Title
14. Email
15. Phone (if different)

### Organizational Budget

16. Total Organizational Budget
17. % Public Funding (Federal, State, Municipal)
18. % Private Funding (Grants, Donor Contributions)
19. % Fees or Other Revenue
20. Upload the "UWMB Ratio Analysis" spreadsheet for your organization
  - Download at this link
21. Upload the most recent audit for your organization (if available)

### Organizational Description

22. In which of the following cities does your organization provide services?
  - Boston neighborhood (Dorchester, Roxbury, Mattapan, or Hyde Park)



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- Boston (other neighborhoods)
  - Cambridge
  - Chelsea
  - Haverhill
  - Lawrence
  - Lowell
  - Lynn
  - Malden
  - Quincy
  - Revere
  - Salem
  - Taunton
  - None of the above
23. What is your organization's mission statement and vision?
24. Describe your leadership team in terms of how they represent your community, their lived experience with the issues on which your organization is focused, and how that experience shapes their approach to leading the organization.
25. Describe your organizational approach to Diversity, Equity, Inclusion, Belonging, and Justice and the policies and practices your organization is undertaking to create equity.
26. **Optional:** You may submit up to three documents that support this section, such as a Theory of Change; Organizational Chart; Diversity, Equity, Inclusion, Belonging, and Justice Statement; or Strategic Plan. Please do not develop documents for this purpose. Applicants will not be penalized for leaving the upload section blank.
27. Which grant are you applying for? (Check boxes, select one or both)
- Direct Service
  - Public Policy

## Application Part II: Direct Service Applicants Only

**Focus Communities** [Boston (prioritizing Dorchester, East Boston, Hyde Park, Mattapan, and Roxbury), Cambridge, Chelsea, Haverhill, Lawrence, Lowell, Lynn, Malden, Quincy, Revere, Salem, and Taunton.]

28. Describe the communities where you provide direct services. Focus on highlighting the services, institutions, and systems that advance or hinder financial well-being in these communities.
29. What is your organization's role in the community in reducing barriers and creating opportunities? How do you engage the broader community in these efforts?

### Direct Service Activities

30. Which of the following avenues to financial well-being do your direct services support? (Check boxes, select all that apply)
  - **Economic Inclusion and Wealth Building** (Individualized services that empower community members to meet their financial goals and achieve financial well-being. Activities include financial coaching, credit building, and asset building, with an emphasis on services integrated with workforce development programs.)
  - **Early Education and Out-of-School Time Programs** (Early education and Out-of-School Time programs that support healthy development and education of children and youth. Activities include providing childcare for infants, toddlers, and preschoolers, and before- and after-school and summer programs for school-aged youth.)
  - **Career Pathways for Youth and Young Adults** (Programs that engage and support 16 to 24-year-olds, who are disconnected from school and work, in education and career pathways. Activities include workforce development, education programming, coaching, and related wraparound services.)
  - **Safe and Stable Housing** (Interventions that interrupt the cycle of housing instability and contribute to making homelessness rare, brief, and non-recurring. Activities include prevention and stabilization services aligned with a Housing First model.)

*Answer the next three questions for each of the direct service activities that you selected.*

31. Describe your direct service activities that align with the box(es) you checked above. In your description, please describe quality standards, accreditation, or evidence-based best practices that inform your service design and delivery. Please tell us about your most recent results.
32. Please describe the focus population for each of the direct service activities you checked above. What are their aspirations and what systemic or institutional barriers do they face?
33. Tell us about the partnerships, communities of practice, or collaborative networks that are most essential to engaging and supporting this population and making

services more accessible and effective. Please describe their goals and limit your response to up to two examples.

34. **Optional:** If you have documents depicting the logic model(s) for the activities described in this application, you may upload them here. Please do not develop documents for this purpose. Applicants will not be penalized for leaving the upload section blank.

### **Partnership & Systems Change**

35. How does your organization include direct service program participants in organizational planning and decision-making?
36. How do you measure participant experience and use that information to inform your organization's activities? With whom do you share that information?
37. Systems change requires reciprocal and collaborative partnerships. Describe the partnerships that are most essential to achieving your organization's goals. Provide one to three examples of how your organization is participating in cross-sector collaborations, coalitions, and/or advocacy aimed at making services and systems more accessible, sustainable, or effective.
38. The narrative above described the areas of systems change that United Way will track and the ways we plan to contribute as a partner. What are the specific ways you want to partner with United Way and its broader network to affect change?



## Policy Applicants Only

**Focus Communities** [Boston (prioritizing Dorchester, East Boston, Hyde Park, Mattapan, and Roxbury), Cambridge, Chelsea, Haverhill, Lawrence, Lowell, Lynn, Malden, Quincy, Revere, Salem, and Taunton.]

28. What is the geographic focus of your public policy activities?
29. How does your organization engage with and listen to people residing in United Way's focus communities?

### Public Policy Activities

30. Which avenue(s) to financial well-being does your organization focus on through public policy? (Check boxes, select all that apply)
  - **Economic Inclusion and Wealth Building** (Promoting economic inclusion and building wealth, such as expanding access to credit and savings opportunities for underserved communities and increasing protections against predatory financial practices.)
  - **Early Education and Out-of-School Time Programs** (Increasing the quality, accessibility, and affordability of EOST programs, advocating for adequate public investment, and reducing the cost burden on families in sustainable ways.)
  - **Career Pathways for Youth and Young Adults** (Removing barriers to education and career for the most marginalized young people, including those experiencing homelessness or housing instability; involved in systems such as the justice system, DYS, or DCF; pregnant or a caregiver; immigrants and refugees, including undocumented; disabled; neurodivergent; LGBTQIA+.)
  - **Safe and Stable Housing** (Advancing solutions that contribute to ending and preventing homelessness, such as expanding access to preventative approaches and deeply affordable housing paired with coordinated services for marginalized populations.)
31. Describe the goals of your public policy activities that align with the box(es) you checked above. Tell us about your most recent results.
32. Describe the focus population for your policy activities and goals. What is your approach to engaging them in shaping your public policy priorities, advocacy efforts, and developing them as leaders addressing the issues facing their communities? Include the partnerships that are most essential to engaging and supporting this population.
33. If your organization participates in relevant collaborative networks or communities of practice, please share them here.
34. **Optional:** If you have documents depicting the logic model(s) for the activities described in this application, you may upload them here. Please do not develop documents for this purpose. Applicants will not be penalized for leaving the upload section blank.

## Partnership & Systems Change

35. How do you raise the visibility of economic justice and expand public understanding of the systemic and institutional barriers to financial well-being that your focus population faces?
36. What are the key sources of data and evidence that guide your policy and advocacy efforts? How have you made publicly available data more accessible?
37. Describe the cross-sector collaborations or coalitions that you lead. How are you influencing the way resources are prioritized or distributed? How are you influencing the way information and data becomes more open and accessible?
38. How do you ensure that the policies you contribute to passing are implemented effectively, equitably, and are adapted, if necessary?
39. The narrative above described the areas of systems change that United Way will track and the ways we plan to contribute as a partner. What are the specific ways you want to partner with United Way and its broader network to affect change?



## Frequently Asked Questions

### Focus Populations & Communities

#### **How did United Way select the 12 focus communities?**

We identified cities with the greatest concentration of poverty, as concentrated poverty is a reliable indicator of chronic underinvestment. According to the 2021 American Community Survey five-year estimates, 293,702 people in our footprint have incomes that are less than the federal poverty rate. Sorting cities in our footprint from largest to smallest number of residents with below-poverty-level status reveals that the top 12 cities are home to more than two-thirds of the people in our footprint living below the poverty level. Additionally, the concentration of people in poverty within each of these cities is 10% or greater.

#### **How did United Way pick the specific neighborhoods in Boston to prioritize?**

Since United Way focuses on prosperity across race and ethnicity, with a specific focus on Black and Latino/a populations, we identified five neighborhoods where more than 50% of residents are Black or Latino/a. These neighborhoods are Dorchester, East Boston, Hyde Park, Mattapan, and Roxbury. While these neighborhoods are our focus within Boston, we welcome applications from organizations that focus on supporting residents citywide and in other Boston neighborhoods.

#### **My organization does not have a physical location in one of the 12 focus communities, but we support people who come from those communities. Can we still apply?**

To be eligible for this funding opportunity, you are not required to have a physical service site in one of the focus communities. Your organization will be eligible for the funding opportunity if a majority of the people participating in activities aligned with our four avenues to financial opportunity come from our focus communities.

#### **How will United Way partner with communities outside the 12 focus communities?**

Every community in our footprint has an opportunity and responsibility to contribute to our shared prosperity. We will continue to work with nonprofit, municipal, and state agency partners across our region on coalitions and other planning and advocacy efforts that are essential to scaling the avenues to financial well-being, such as the development of affordable housing. Organizations in other communities can continue to participate in United Way programs, learning opportunities, special grants, or state funding opportunities, such as the recent Summer Step Up program and MA Alliance for Supportive Housing.

#### **People of many races and ethnicities experience injustice. Why is United Way focused on Black and Latino/a populations?**

Among organizations that support individuals on their path to prosperity, United Way is prioritizing investment in those that are focused on the well-being of Black and Latino/a populations. While not monolithic, members of these two demographic groups in general have been most marginalized from avenues to financial well-being in our region as we can see from the median income by racial or ethnic group, youth disconnection rates, and housing stability statistics. In addition to investing in organizations that focus on Black and Latino/a populations, we will prioritize investments in





organizations that serve people with varying life experiences that overlap with race and ethnicity to create additional, compounding structural barriers, such as other people of color, those for people of various genders and sexual orientations and according to their disability status and immigration or citizenship status.

## Funding & Awards

### How can we use the funding?

This grant opportunity is for unrestricted funding. Organizations will use their own discretion in spending the grant funds to achieve their mission and goals in the community. United Way will not ask for a program budget or for verification of how the funding was spent.

### What is the timeline of the funding? Is it really seven years of uninterrupted commitment? When will payments be made?

For year one beginning October 2023, grants will be paid in October, January, and April for the initial grant period of September 2023 through August 2024. Beginning September 2024 through the remainder of the grant award, grants will be paid quarterly. Organizations that are awarded funding in October 2023 will not need to reapply during the seven-year period.

While we are committed to these partners and funding priorities from October 2023 - August 2030, funding will be provided by United Way to partner agencies subject to availability and results. In this context, availability means United Way's success in raising revenue from corporations, foundations and donors. Results means the agency's partnership and contributions to a set of mutually agreed upon outcomes, as will be articulated in a forthcoming Memorandum of Understanding. For more information about anticipated reporting and how United Way will measure impact, see the section below titled, "Partnership & Reporting."

### How many grants will United Way award this year? Will there be another onramp for funding?

We will award 70-90 grants through this funding opportunity, including direct service and public policy grants. We recently announced Community Action Grants for grassroots action and advocacy. In the coming years, we hope to continue offering Community Action Grants and add a funding opportunity for Collective Impact. If funding allows, we hope to add direct service and public policy organizations midcycle.

### How do we select the amount of money we wish to apply for?

Your organization will not apply for a specific amount of funding. Levels will be set based on organizational size and the scope of contributions to the priorities described in this RFP.

### How will United Way use my financial information?

United Way reviews all of prospective grantee financial information, in order to better understand the fiscal strengths of organizations, to target supports and resources where needed, and to ensure investments are made in organization's in financial good standing.



**I am having trouble completing the financial information part of the organization. What should I do?**

Please email [cihelpdesk@supportunitedway.org](mailto:cihelpdesk@supportunitedway.org) and request help in completing this information. A United Way staff person will work with you to gather appropriate fiscal data.

## Funded Activities

**Can my organization apply for both direct service and public policy opportunities?**

Yes. There is a check box in Part I to indicate whether you are applying for direct service, public policy, or both funding opportunities. Based on your response to that question, you will complete Part II for Direct Service and/or Part III for Public Policy.

**I am not sure if our programs are eligible for direct service funding. Where can I find out more about the kinds of direct service activities you want to fund?**

If you provide programs or services that you think align with one or more of the descriptions in the Direct Services table on pages 4 and 5, then you are invited to complete the eligibility form. All eligible organizations will have the opportunity to request a 1:1 conversation, attend an information session, and/or drop by for office hours, as described in the applicant support and timeline section on page eight. These are optional opportunities to discuss partnership and ask questions about any aspect of this application and funding opportunity.

**We already responded to the question about our service area in the Eligibility Form. Why are we doing it again?**

United Way has repeated these questions to assist community reviewers and to allow you the opportunity to modify your responses in case you are including services in the RFP that you didn't consider when you responded to the eligibility questionnaire.

**We are launching a new program in the Fall of 2023. Can we include that program in our Direct Service application?**

No. United Way will consider programs that have been operating for at least one year.

## Partnership & Reporting

**We have been a United Way partner in the past. Will that be considered in United Way's decisions?**

All eligible organizations who submit completed applications will be given equal consideration for these funding opportunities.

**How is United Way going to measure the impact of funded partners?**

In order to advance economic justice at such a scale that we see changes in financial well-being and prosperity at the population level, United Way is focused on influencing systems change, together with our partners, as described on page 6 of this document. Most of these systems-level outcomes are best measured through annual landscape analyses, which we will turn to our partners—trusted sources of information about their communities—to help us complete. Mutually agreed upon outcomes will be articulated in the forthcoming Memorandum of Understanding.



**If we are selected, what are United Way’s expectations around reporting (process and content)?**

Our intention is to reduce conventional reporting over the course of the grant by focusing on population-level changes. We hope to co-develop goals during our partnership, and hold ourselves accountable to them, as well as meet with your organization when it makes sense throughout the year to better support our collective efforts. Reports will focus on developing a picture of what is happening in the community.

**My organization aspires to contribute to changing the systems in which we work, but we are unsure how to talk about it in our application. Are we eligible? How can United Way help?**

First, we want to affirm that changing systems is about adaptation—there is no straight line or easy path to success. United Way is looking for partners who share the vision, goals, and priorities articulated in this RFP narrative, for the long-term, and for partners who are working to change systems in ways described on page 6 of this document. We look for partners who demonstrate ways they persist through challenges, not simply those with a list of individual successes. We believe organizations participate in systems change in different ways, and we can help you figure out how to talk about that in your application. Our goal is to support organizations in meeting their aspirations. All eligible organizations will have the opportunity to request a 1:1 conversation, attend an information session, and/or drop by for office hours, as described in the list of applicant supports on page 8. These are optional resources provided to ensure your organization has ample opportunities to ask questions about any aspect of this application and funding opportunity.

**How did United Way select these areas of systems change for focus and tracking?**

Our strategic planning work kicked off in 2021. During that planning we recognized that the only way to advance economic justice at the population level is to focus on influencing changes to the systems that reinforce existing barriers to accessing safe and stable housing, quality early education and out-of-school time programs, education and career pathways for youth and young adults, and opportunities to build wealth. Using evidence gathered during our Community Conversations with residents in 2022, our town hall listening sessions with service providers, dozens of interviews with external stakeholders, extensive consideration of literature, our staff members' experience, and guidance from consultants at the RAND Corporation, we determined these specific types of systems change to be the most critical for advancing economic justice at scale and most directly relevant to our strategies for making four avenues to financial well-being more inclusive of our target population.

**How will United Way partner with applicants who are not selected for funding?**

United Way will not have the capacity to fund every applicant. We hope that organizations that are not funded will still find it beneficial to collaborate with United Way on coalitions and other planning and advocacy efforts that are essential to scaling the avenues to financial well-being, such as the development of affordable housing. Organizations in other communities can continue to participate in United Way programs, learning opportunities, special grants, or state funding opportunities, such as the recent Summer Step Up Program, ASOST-R, Commonwealth Preschool Partnership Initiative, and MA Alliance for Supportive Housing.

## Definitions

### How does United Way define economic justice?

Economic justice is the belief that the whole community prospers when each person can create a sufficient material foundation upon which to have a dignified, productive, and creative life.

### The Safe & Stable Housing section mentions the Housing First model. What is that?

Housing First is an evidence-based model that provides people experiencing the cycle of housing instability and homelessness with stable housing without qualification, enabling them to sustainably engage with resources that support healing and thriving, such as holistic healthcare and educational and employment services. We have defined this elsewhere, [including here](#). While crisis response is one important component of ending homelessness, United Way will direct philanthropy toward long-term solutions that reduce the need for crisis response whenever possible.

### What is asset-framing or asset-based framing? Where can I find more information on that?

Asset-based framing is a powerful approach to communication. It always begins with the strengths, skills, and potential of individuals and communities, rather than solely emphasizing their deficits or problems. This helps to inspire solutions and collaboration. When discussing challenges or barriers, asset framing roots them in the systems that perpetuate harm, rather than in individual failure. For more information, check out these resources:

- [Skillman Foundation Interview with Trabian Shorters](#)
- [Trabian Shorters and the Genius of Asset Framing](#)
- [Asset-Framing: The Other Side of the Story](#)



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