



United Way  
of Palm Beach County

## **Community Impact Grant Guidelines**

### **Housing & Homelessness Request for Applications**

Fiscal Year October 1, 2024 – September 30, 2025

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## Timeline

- 5/21/24                      Announcement and release of Community Impact funding for Fiscal Year 2024-2025 Housing & Homelessness Request for Applications (RFA).
- 5/28/24 at 10:00am**                      **REQUIRED ORIENTATION** – Virtual Applicant Orientation Session will be held on Tuesday, May 28, 2024 from 10:00am – 12:30pm.
- Nonprofit organizations must participate in the virtual session or watch the recording. Registration is required: <https://www.unitedwaypbc.org/2024-request-for-applications>
- 6/5/24 by 5:00pm                      Deadline for nonprofit organizations to submit written questions regarding the Housing & Homelessness RFA. Submit all questions to [impact@unitedwaypbc.org](mailto:impact@unitedwaypbc.org)
- 6/7/24                      Responses to questions regarding the Housing & Homelessness RFA are posted on United Way of Palm Beach County’s website at <https://www.unitedwaypbc.org/2024-request-for-applications>
- 6/18/24 by 12:00pm**                      **APPLICATION DEADLINE** – To be considered for funding, applications must be submitted prior to 12pm (noon) using United Way of Palm Beach County’s grant website (CyberGrants), accessed at <https://www.unitedwaypbc.org/2024-request-for-applications>
- In accordance with United Way of Palm Beach County’s Policy on the Submission of Late or Incomplete Grant Applications, late applications and applications missing required information or documents will not be accepted.**
- 6/21/24 - 9/19/24                      United Way volunteers review applications and make determinations regarding funding.
- 9/19/24 - 9/20/24                      United Way staff notifies applicants regarding the status of their applications (award or decline).
- 9/23/24 – 9/30/24                      Contracts are negotiated and finalized.
- 10/1/24                      Fiscal Year 2024-2025 funding begins.

## **About United Way of Palm Beach County**

For over 94 years, United Way of Palm Beach County (UWPBC) has been supporting local human service programs that achieve measurable results. Following the devastating hurricane of 1928, community leaders recognized the need for a unified effort to respond to human needs. As a result, in 1929, several federated organizations were formed in Palm Beach County. Since that time, the original organizations have undergone many changes in title and structure. At one time, four separate United Way organizations existed in Palm Beach County. After several mergers, UWPBC was formed in 1992 to serve all of Palm Beach County.

The mission of UWPBC is to ensure that everyone in Palm Beach County has access to the basics: a quality education, a place to live, financial stability, good medical care, and enough to eat. In accordance with our mission, UWPBC consistently strives to create powerful community impact.

UWPBC's local community impact work focuses on supporting human services programs that are run by local nonprofits and that directly benefit the Palm Beach County residents who are most in need. This work also involves participating in local collaboratives and initiatives. UWPBC recognizes that it can only achieve its goals in partnership with others. In all the work UWPBC does, the organization remains committed to achieving meaningful and lasting results.

## **Funding Opportunity Overview**

United Way of Palm Beach County is seeking applications from nonprofit organizations to implement the funding strategies of the Housing & Homelessness impact area as described in this Request for Applications (RFA). Eligible nonprofit 501(c)(3) organizations that are currently providing, or could successfully implement, quality services or programs in alignment with one or more of the strategies noted in the RFA are encouraged to apply for UWPBC funding. A list of eligible nonprofit organizations is provided in Appendix A.

Nonprofit organizations with programs that are focused on supporting the ALICE population and those living in poverty, in geographic locations with a pressing need, that provide services within a best practices framework, that are collaborative and integrated into the fabric of other community efforts, and that are innovative, will be at an advantage in seeking UWPBC funding.

ALICE is an acronym that stands for Asset Limited, Income Constrained, Employed. The ALICE population represents hardworking yet struggling residents who have little or no savings and are often one emergency from falling into poverty. Nonprofit organizations are encouraged to take the time to understand ALICE and determine if their program is a fit for this population. For more information, visit the [United for ALICE Florida Interactive Dashboard](#).

Funding for programs is subject to availability and approval by United Way of Palm Beach County's Board of Directors. Funds will be provided to support programs for one year beginning October 1, 2024. Funding may be renewed for one additional year contingent upon program performance and the availability of contributions and other funding provided to UWPBC. The minimum grant award is \$50,000. There is no maximum grant award.

### **Priority Goals, Strategies, and Key Performance Indicators**

This RFA, which is focused on the Housing & Homelessness impact area, seeks to invest in programs that achieve the goal of helping individuals and families achieve housing stability.

In order to effectively measure progress towards the goal, UWPBC has developed a set of key performance indicators. Key performance indicators will allow aggregation of results by strategy, facilitating better assessment of positive effects for program participants and enabling better communication of the overall impact across all United Way funded programs.

The strategies and key performance indicators chosen to achieve the goal can be found on the following pages. Nonprofit organizations must select one strategy that best aligns with the program for which they are seeking funding. Programs must report their progress using all key performance indicators listed for their chosen strategy. Please note the instructions specifying how performance indicators should be calculated.

## **Goal: Individuals and families achieve housing stability**

Programs funded under this goal will be expected to participate in Palm Beach County's Homeless Continuum of Care, enter data in the Palm Beach County Homeless Management Information System (HMIS), and participate in all Point-In-Time Counts. Programs serving victims of domestic violence are exempt from the HMIS requirement.

### **Strategy 1: Housing Stabilization**

Programs funded under this strategy will provide financial assistance and case management services to help households avoid seeking or entering emergency shelter. Financial assistance may include rental assistance to stop eviction, relocation assistance (including first and last month's rent, security deposit, and utility deposit assistance), and/or short-term rental subsidies. Case management may include housing search/placement, landlord-tenant mediation, referrals to supplemental services (such as legal assistance, financial literacy coaching, and job development services), and diversion assistance to connect households with their existing support systems.

### **Target Population**

Households living within the ALICE Threshold and those living in poverty who are facing eviction, living in doubled-up housing situations that are about to end, and those in need of assistance to secure affordable housing because they are at imminent risk of homelessness. Households have no significant barriers, other than financial ones, to sustaining housing.

### **Why This Strategy Is Important**

According to federal statutes, an individual or family is considered at risk of homelessness if their income is below 30% of the median income in the geographic area, they have insufficient resources or support networks (e.g., family, friends, faith-based or other social networks) immediately available to prevent them from moving to an emergency shelter, they have moved frequently because of economic reasons, are living in the home of another because of economic hardship, have been notified that their right to occupy their current housing or living situation will be terminated, live in a hotel, live in severely overcrowded housing, are exiting an institution, or otherwise live in housing that has characteristics associated with instability and an increased risk of homelessness (HUD Exchange, 2024).

Financial assistance and case management services have been proven to reduce evictions, prevent homelessness, and help at-risk households successfully stabilize their housing situation. For example, a rigorous evaluation of New York City's Homebase Community Prevention program, which includes short-term financial assistance and supportive case management services, found that families at-risk of homelessness who participated in the program spent 22 fewer nights in the shelter system and were less likely to spend even one night in an emergency shelter during the two year follow-up period (National Low Income Housing Coalition, 2019). Another study found that short-term financial assistance reduced the number of families living in shelters or on the street by 75% and reduced the number of families living in overcrowded conditions by more than half (Fischer, W., Rice, D., & Mazzara, A., 2019).

Housing stability is a key social determinant of health. Households that have trouble paying rent, spend the majority of their income on housing related expenses, move frequently due to economic pressures, or deal with overcrowded home environments tend to experience negative impacts on their physical and mental health. Additionally, the lack of affordable housing available leaves many low-income households with limited options, so they may be forced to rent substandard housing that can expose them to multiple health and safety risks (Office of Disease Prevention and Health Promotion, 2024).

## **Best Practices**

- Participate in Palm Beach County's Homeless and Housing Alliance (HHA) and align with Leading the Way Home, Palm Beach County's Ten Year Plan to End Homelessness (information about the HHA and the ten year plan can be found at <https://www.thehomelessplan.org/>).
- Take referrals from agencies serving people at risk of homelessness or actively seeking emergency shelter.
- Provide the minimum assistance needed for the shortest time possible.
- Build relationships with landlords agreeing to rent to clients who would otherwise be screened out.
- Use a strengths-based approach that honors client preferences, invites their participation in problem-solving, and encourages them to use their existing resources.
- Case management should include referring clients to and/or providing supportive services such as financial literacy education, budgeting assistance, childcare, and other resources as needed.

## **Key Performance Indicators**

- A. Percent of households that avoid seeking or entering emergency shelter during the six-month follow-up period
- B. Percent of households that report being stably housed three months after receiving financial assistance

## Why These Indicators Are Important

These indicators demonstrate the impact of stabilizing households through homeless prevention services.

According to a recent study in the Review of Economics and Statistics Journal, households that were offered temporary financial assistance were 81% less likely to experience homelessness within six months, and 73% less likely to experience homelessness within 12 months. The study concluded that for every \$1 spent on temporary financial assistance, the community gets \$2.47 back through a reduction in the utilization of crisis services such as shelters and emergency rooms (Phillips, D.C., & Sullivan, J.X., 2023).

## Data Sources

HMIS, client files

## How to Calculate

### Indicator A

1. Total the number of households that received a six month follow-up during the reporting period. This is the denominator.
2. Total the number of households within the above population whose six-month follow-up, as verified in HMIS, revealed they did not seek or enter emergency shelter. This is the numerator.
3. Divide the numerator by the denominator and multiply by 100. This is the outcome percentage.

### Indicator B

1. Total the number of households that received a three month follow-up during the reporting period. This is the denominator.
2. Total the number of households within the above population who reported being stably housed at the three month follow-up. This is the numerator.
3. Divide the numerator by the denominator and multiply by 100. This is the outcome percentage.



## **Strategy 2: Transitional Housing for Domestic Violence**

Programs funded under this strategy will provide Transitional Housing or Rapid Re-Housing for households impacted by domestic violence.

### **Target Population**

Households living within the ALICE Threshold and those living in poverty who are impacted by domestic violence and facing barriers to housing stability.

### **Why This Strategy Is Important**

Domestic and sexual violence is a leading cause of homelessness for women and children, and the need for safe and affordable housing is one of the most pressing concerns for survivors. Many survivors leave their abusive partner multiple times, leading them to experience multiple episodes of homelessness (National Network to End Domestic Violence, 2024). Housing programs can provide critical services for survivors and are often a key component in helping them find safety and stability (Safe Housing Partnerships, 2024).

While emergency shelter can be a source of immediate safety, transitional housing offers high-risk survivors safe housing and supportive services needed for stabilization and recovery, such as counseling, childcare, transportation, life skills, education and/or job training. Survivors are able to reside in transitional housing for up to 24 months, giving them time to participate in supportive services that will help them achieve long-term safety and stability. Without being able to pursue services in a safe and stable home environment, survivors may have no options other than returning to their abuser's home or facing homelessness (Clark., D., Wood., Leila., Sullivan, C., 2018; Rogers, L. L., 2019).

Rapid Re-Housing programs have been shown to be effective in creating housing stability for those experiencing homelessness. By removing housing as a barrier, people are better able to address the other challenges that may have led to their homelessness. This intervention has been effective for people traditionally perceived to be more difficult to serve, including people with limited or no income and survivors of domestic violence. Research demonstrates that those who receive Rapid Re-Housing assistance are homeless for shorter periods of time and are housed at a lower cost than those assisted with shelter (National Alliance to End Homelessness, 2024). Survivors who have been able to maintain employment, have existing positive social networks and support, are seeking more autonomy, have access to transportation, and can be immediately rehoused safely, may be good candidates for Rapid Re-Housing (Safe Housing Partnerships, 2024).

A recent study illustrated the promise of a new Domestic Violence Housing First (DVHF) model. This model is a housing first approach adapted to support survivors of domestic violence. It's designed to help survivors attain safe and stable housing quickly while also providing supportive services. The study revealed that survivors who received DVHF reported greater improvements in housing stability over 24 months compared to those who received "services as usual", which prioritize support groups, counseling, legal advocacy, and referrals (Sullivan, C.M., Simmons, C., Guerrero, M., Farero, A., Lopez-Zeron, G., Ayeni, O. O., Chiaramonte, D., & Sprecher, D., & Fernandez, A.I., 2023; National Low Income Housing Coalition, 2023).

## **Best Practices**

- Participate in Palm Beach County's Homeless and Housing Alliance (HHA) and align with Leading the Way Home, Palm Beach County's Ten Year Plan to End Homelessness (information about the HHA and the ten year plan can be found at <https://www.thehomelessplan.org/>)
- Address financial barriers to housing stability (e.g., help clients repair credit and increase savings).
- Use client preferences to guide housing search.
- Avoid overly restrictive rules and criteria that limit access to housing and supportive services.
- Provide and/or link clients to supportive services such as counseling, legal assistance, etc.
- For Rapid Re-Housing, follow Palm Beach County's Homeless and Housing Alliance Rapid Re-Housing Program Standards, providing the level of assistance appropriate for households' needs.

## **Key Performance Indicators**

- A. Percent of households that exit to safe, affordable permanent housing (Transitional Housing only)
- B. Percent of households that increase their income (including wages, benefits)
- C. Percent of households that maintain their income (including wages, benefits)

## **Why These Indicators Are Important**

These indicators demonstrate the impact of stabilizing households impacted by domestic violence.

Many abusers gain power and control in a relationship by limiting access to assets, concealing financial information, or ruining a survivor's financial profile. Once a survivor leaves their abuser, it may be extremely difficult for them to attain long-term economic security because of ruined credit scores, sporadic employment histories, and legal issues caused by the violence. For many survivors, concerns about their ability to take care of themselves and their children financially is a significant reason they return to the abuser (Clough, A., Draughon, J., Njie-Carr, V., Rollins, C., & Glass, N., 2013).

Survivors who gain access to economic resources such as living-wage jobs, affordable and quality childcare, and social safety nets like Temporary Assistance for Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP), and Social Security Disability Insurance (SSDI) are more likely to remain safe and secure (National Network to End Domestic Violence, 2017).

## **Data Sources**

Client files

## **How to Calculate**

### Indicator A

1. Total the number of households that exited the program during the reporting period. This is the denominator.
2. Total the number of households within the above population that exited to safe, affordable permanent housing. This is the numerator.
3. Divide the numerator by the denominator and multiply by 100. This is the outcome percentage.

### Indicator B

1. Total the number of households served by the program during the reporting period. This is the denominator.
2. Total the number of households within the above population that increased their income (including both wages and benefits). This is the numerator.
3. Divide the numerator by the denominator and multiply by 100. This is the outcome percentage.

### Indicator C

1. Total the number of households served by the program during the reporting period. This is the denominator.
2. Total the number of households within the above population that maintained their income (including both wages and benefits). This is the numerator.
3. Divide the numerator by the denominator and multiply by 100. This is the outcome percentage.

### **Strategy 3: Permanent Supportive Housing**

Programs funded under this strategy will provide Permanent Supportive Housing and intensive case management services to individuals and families experiencing homelessness.

#### **Target Population**

Households living within the ALICE Threshold and those living in poverty who meet the U.S. Department of Housing and Urban Development (HUD) definition of literal homelessness and include a head of household with a documented disability. Households face significant barriers to housing stability including chronic homelessness, substance abuse, mental illness, extensive criminal history, multiple past evictions, unpaid debts to landlords, etc. Housing should be coupled with supportive case management services.

#### **Why This Strategy Is Important**

Permanent Supportive Housing is a proven, cost-effective approach that combines affordable housing assistance with voluntary support services to address the needs of chronically homeless individuals and families with long-term disabilities (Technical Assistance Collaborative, 2024). The services are designed to build independent living and tenancy skills as well as connect individuals with community-based health care, treatment, and employment services (National Alliance to End Homelessness, 2024).

Research has shown that permanent supportive housing interventions increased long-term housing stability for up to 90% of recipients (Aubry, T., Bloch, G., Brcic, Vanessa, et al., 2020; Kerman, N., Kidd, S.A., Mutschler, C. et al., 2023). This model is considered a cost-effective solution, with lower costs than those associated with using crisis services such as shelters, hospitals, jails, and prisons (National Alliance to End Homelessness, 2024).

#### **Best Practices**

- Participate in Palm Beach County's Homeless and Housing Alliance (HHA) and align with Leading the Way Home, Palm Beach County's Ten Year Plan to End Homelessness (information about the HHA and the ten year plan can be found at <https://www.thehomelessplan.org/>).
- Avoid overly restrictive rules and criteria that limit access to housing and supportive services.
- Protect tenant rights within consistently enforced policies and procedures.
- Offer tenants meaningful opportunities for input.
- Provide supportive services that are client-driven and foster independence.

## Key Performance Indicators

- A. Percent of households that maintain their housing or exit to safe, affordable permanent housing
- B. Percent of households that maintain their income (including wages, benefits)
- C. Percent of households that increase their income (including wages, benefits)

## Why These Indicators Are Important

These indicators demonstrate the impact of stabilizing and supporting households experiencing chronic homelessness. Permanent Supportive Housing is successful when households maintain their living situation and abide by the terms of their lease (Substance Abuse and Mental Health Services Administration, 2010). Although these households face significant barriers to housing stability, with support, they can increase self-sufficiency over time and may even feel ready to exit to permanent housing.

Consistent income is critical to long-term housing stability. Many households participating in Permanent Supportive Housing programs receive disability benefits as their only source of income; however, many people experiencing homelessness understand that employment can be a path out of homelessness. Several surveys reveal that as many as 9 out of 10 people experiencing homelessness want to work. Though they may have multiple barriers to employment, Permanent Supportive Housing and the case management services provided (including job training and support) can help participants increase their income, further improving their lives (Employment Supports: What Permanent Supportive Housing Providers Need to Know, HUD Exchange, 2024).

## Data Sources

Client files, HMIS

## How to Calculate

### Indicator A

1. Total the number of households served by the program during the reporting period. This is the denominator.
2. Total the number of households within the above population that maintained their housing or exited to safe, affordable permanent housing. This is the numerator.
3. Divide the numerator by the denominator and multiply by 100. This is the outcome percentage.

Indicator B

1. Total the number of households served by the program who had income from any source at the start of the reporting period. This is the denominator.
2. Total the number of households within the above population that maintained their income (including both wages and benefits). This is the numerator.
3. Divide the numerator by the denominator and multiply by 100. This is the outcome percentage.

Indicator C

1. Total the number of households served by the program during the reporting period. This is the denominator.
2. Total the number of households within the above population that increased their income (including both wages and benefits). This is the numerator.
3. Divide the numerator by the denominator and multiply by 100. This is the outcome percentage.

## General Application Information

### *Terms of Agreement*

UWPBC seeks to invest a portion of its unrestricted contributions in 501(c)(3) nonprofit organizations that serve Palm Beach County residents within the ALICE population and those living in poverty with program-based services that align with the strategies identified in this RFA.

Nonprofit organizations selected to receive funding through this RFA process will be required to:

- Sign an agreement with UWPBC, with the application serving as a component of the agreement.
- Sign and abide by UWPBC's Standards of Accountability (Appendix B).
- Sign and abide by UWPBC's Certificate of Compliance (Appendix C).
- Obtain or maintain Accreditation through Nonprofits First. Nonprofit organizations are responsible for paying the annual fee for accreditation directly to Nonprofits First and may include all or a portion of this expense in their program budget. If already accredited, funded agencies must maintain accreditation throughout the period of this agreement. If not accredited, accreditation must be achieved within 18 months of receiving UWPBC funding. Renewed funding will be considered only if accreditation is maintained or, for agencies not currently accredited, achieved within the specified timeframe.
- Attain and maintain compliance standards as defined by UWPBC, including standards that assure UWPBC of the funded agencies' sound business practices in the areas of governance, administration, board governance, human resources, and financial management. UWPBC reserves the right to modify its current compliance standards and/or add to more restrictive compliance standards, without advance notice as it deems necessary and in its discretion.
- Maintain insurance coverage including commercial general liability insurance in the amount of \$1,000,000 per occurrence, workers' compensation insurance, and employer's liability insurance.
- Identify themselves as UWPBC funded agencies by displaying the current UWPBC trademarked logo within their facilities and on all communications materials pertaining to UWPBC funded programs.
- Track client demographics including gender, age, race/ethnicity, disability status, military status, income level, and zip code.

UWPBC will commit funds in support of selected programs for one year, with the possibility of renewal funding for one additional year, based on:

- The continued demonstrable need for program services;
- Satisfactory performance of the program to be measured as mutually agreed upon in each separate agreement between the nonprofit organization and UWPBC; and
- The availability of sufficient contributions to UWPBC.

### ***Application Submission and Review Process***

Applications must be submitted using United Way's grant website (CyberGrants), accessed at <https://www.unitedwaypbc.org/2024-request-for-applications>.

Detailed contact, organization, organization financial information, and program information and budget is required as part of the application process. Instructions for each question are embedded within the application. A preview of the application questions, an application guidance document, and a checklist can be accessed at <https://www.unitedwaypbc.org/2024-request-for-applications>.

**Nonprofit organizations must participate in the Virtual Applicant Orientation session** on Tuesday, May 28, 2024 from 10:00am – 12:30pm, or watch the full recording. Registration is required. The Virtual Applicant Orientation Session recording will be made available on UWPBC's website at <https://www.unitedwaypbc.org/2024-request-for-applications> by Wednesday, May 29, 2024.

**The deadline to submit applications is Tuesday, June 18, 2024 prior to 12:00 pm (noon).**

**In accordance with UWPBC's Policy on the Submission of Late or Incomplete Grant Applications, late applications and applications missing required information or documents will not be accepted.**

Applications will be reviewed by volunteers comprised of UWPBC Community Impact Committee members and other community members. Application Review Criteria can be found in Appendix D. Should the reviewers have any questions during the application review process, nonprofit organizations may be contacted via email and/or scheduled for a Zoom meeting. Based on the review of the applications, the volunteers will develop funding recommendations. These recommendations are scheduled to be presented to UWPBC's Board of Directors on Thursday, September 19, 2024, at which time the Board will make its final determination regarding funding. Nonprofit organizations will be notified



of the determination by Monday, September 23, 2024. All funding decisions are final, and appeals will not be accepted.

Throughout the application and review process, nonprofit organizations are asked to refrain from lobbying or discussing in any way their applications with UWPBC's Board of Directors, staff, or involved volunteers. Such discussions may disqualify a nonprofit organization's application(s) from further consideration.

### ***Communication During the RFA Process***

Questions and clarifications about the RFA and application content may be asked during the Virtual Applicant Orientation Session on Tuesday, May 28, 2024 from 10:00am – 12:30pm; otherwise, questions must be submitted in writing via email to [impact@unitedwaypbc.org](mailto:impact@unitedwaypbc.org) by 5:00pm. on Wednesday, June 5, 2024. Questions about specific program details will likely not be addressed unless the answer would be beneficial to all applicants and could be shared among them. **Phone calls are prohibited.** Please note that all UWPBC staff members and volunteers have been instructed to re-direct any communication regarding the RFA and application process back to the email listed above. Responses to submitted questions that communicate significant new information or significant changes to information provided earlier, or that communicate material changes in schedules mentioned herein, are scheduled to be posted on UWPBC's website at <https://www.unitedwaypbc.org/2024-request-for-applications> by Friday, June 7, 2024. **Nonprofit organizations are required to review these responses and revise their applications as necessary to ensure all applications submitted to UWPBC comply with any new or changed information, requirements, or schedules described in these responses.**

Please keep in mind that UWPBC will only consider applications that have been submitted using United Way's grant website (CyberGrants) by the application deadline and that include all required information and documents. **Nonprofit organizations are strongly encouraged to complete their applications early to avoid missing the deadline because of delays in obtaining required attachments, getting answers to technical questions, etc.**

### ***Application Technical Support***

CyberGrants Helpdesk support is available for technical questions related to the application. To access CyberGrants Helpdesk support, click the "Need Support?" link located at the bottom of each page of the application. CyberGrants Helpdesk support is typically available Monday through Friday from 9:00am - 5:00pm. Most technical questions submitted to the Helpdesk will receive a response from CyberGrants within one business day.

### ***Post-Award Requirements and Disbursement of Funds***

UWPBC requires semi-annual reporting (programmatic and financial) from all funded programs. The disbursement of funds typically occurs on a quarterly basis in accordance with the funding agreement between UWPBC and the agency.

## Appendix A

### *Eligible Nonprofit Organizations*

The following nonprofit 501(c)(3) organizations that are currently providing, or could successfully implement, quality services or programs in alignment with one or more of the strategies noted in the Request for Applications are eligible and encouraged to apply for United Way of Palm Beach County funding.

1. Achievement Centers for Children & Families
2. Adopt-A-Family of the Palm Beaches
3. Aid to Victims of Domestic Abuse
4. Alzheimer's Community Care
5. American Association of Caregiving Youth
6. Arc of Palm Beach County (The)
7. Arc of the Glades (The)
8. Bound for College
9. Boys and Girls Clubs of Palm Beach County
10. Clinics Can Help
11. Communities In Schools of Palm Beach County
12. Community Health Center of West Palm Beach
13. Community Partners of South Florida
14. CROS Ministries
15. El Sol
16. Epilepsy Alliance Florida
17. Families First of Palm Beach County
18. Family Impact Palm Beach County
19. Farmworker Coordinating Council of Palm Beach County
20. Florida Fishing Academy
21. For The Children
22. Glades Initiative
23. Gulfstream Goodwill Industries
24. Healthy Mothers Healthy Babies Coalition of Palm Beach County
25. Home Safe
26. Jeff Industries
27. Legal Aid Society of Palm Beach County
28. Literacy Coalition of Palm Beach County
29. Lord's Place (The)
30. Milagro Center
31. Palm Beach County Food Bank
32. Palm Beach County Medical Society Services
33. Path to College
34. Ruth & Norman Rales Jewish Family Services
35. Take Stock in Children
36. Urban League of Palm Beach County
37. Vita Nova
38. Volen Center (The)
39. YWCA of Palm Beach County

## Appendix B

### *Standards of Accountability*

United Way of Palm Beach County's Standards of Accountability listed below define the minimum standards to assure appropriate accountability of organizations receiving funding from United Way. Funded agencies must be compliant with each of the below Standards of Accountability throughout the period of this agreement.

- Standard 1: Agency is tax-exempt under IRS Section 501(c)(3) and is incorporated as a nonprofit organization in the State of Florida.
- Standard 2: Agency agrees to understand and comply with all applicable federal, state, and local laws, including laws governing agency operations and employment practices.
- Standard 3: Unless Agency is permitted to obtain and maintain its Accreditation at the level of Core Infrastructure pursuant to the terms of Section B(18) of the contract, agency must have an annual financial statement audit completed within six months of the end of its fiscal year by an independent certified public accountant in accordance with generally accepted accounting principles. In addition, regardless of whether agency is required to obtain an annual financial statement hereunder, agency must timely file IRS Form 990, 990-EZ, or 990-N with the Internal Revenue Service. Agency must provide Nonprofits First, Inc. with an electronic copy of its annual financial statement audit, as well as its management letter, if any, no later than six months after the completion of the fiscal year audited (if applicable). Also, agency must provide Nonprofits First, Inc. with an electronic copy of the filed IRS Form 990, 990-EZ, or 990-N within nine months of the fiscal year end. Both the audit and IRS Form 990 must provide evidence that the agency is fiscally sound.
- Standard 4: Agency will provide equal access to services to all who qualify without discriminating based on race, religion, national origin, disability, gender, veteran status, sexual orientation, or age. This standard does not prohibit agency from offering specific programs designed to meet the special needs of target populations based on age, gender, race, health, or disability.
- Standard 5: Agency will not discriminate on the basis of race, religion, national origin, disability, gender, veteran status, sexual orientation, or age in any manner, including, without limitation in its hiring practices, promotion of personnel, admittance of members, election to the board of directors, or selection of volunteers or vendors. This standard does not prohibit any agency from limiting membership to the organization and/or its board of directors to the specific demographics that the agency serves, so long as such restrictions are consistent with the nature of the organization, are established and maintained in good faith, and, in United Way's opinion, do not pose any risk to United Way as a result of United Way's association with the agency.
- Standard 6: Agency has by-laws that determine: minimum and maximum number of board members; tenure of board members, officers, and committees; quorum requirements; and that members of its board of directors serve without compensation.

- Standard 7: Agency is governed by a board of directors that: meets with a quorum at least four times per year; annually reviews the organization's mission statement; annually reviews the organization's by-laws; approves the annual budget; reviews financial statements at least quarterly. Agency will provide training to board members on their roles and responsibilities.
- Standard 8: Agency has board policies that state that members of the board of directors must identify all conflicts of interest and may not participate in decisions affecting themselves or organizations they represent.
- Standard 9: Agency will maintain appropriate administrative records and make those records, including its annual budget, year-to-date financial statements, and program outcomes, available to United Way for review within three (3) days of United Way's written request. These records must reflect efficient administration.
- Standard 10: Agency will maintain appropriate records of operational management, including records with respect to training of staff and volunteers as to their roles and responsibilities, table of organization, staff evaluation, and staff turnover, and make those records available to United Way for review within three (3) days of United Way's written request. These records must reflect a well-managed organization.
- Standard 11: Agency will collaborate with other health and human service agencies in providing quality services to similar populations.
- Standard 12: Agency shall comply with such other standards as United Way may adopt from time to time upon written notice to Agency.

The agency agrees to comply with the above Standards of Accountability and to obtain and maintain accreditation from Nonprofits First, Inc. (the "Accreditation") at the level of at least Sound Nonprofit Management; provided, that, if (a) agency is not required under any federal, state, or local law to obtain or file an annual financial statement reviewed or audited by an independent party and (b) agency in fact does not obtain or file any such annual financial statements, then the Accreditation may instead be at the lower level of Core Infrastructure.

**Accredited Agencies:** If agency already maintains Accreditation at the level required above, Agency will maintain such Accreditation (or greater) throughout the period of this Agreement. Agency will successfully complete the annual renewal process for such Accreditation as outlined by Nonprofits First, Inc. Renewed funding will be considered only if agency has maintained such Accreditation and may be denied funding solely on the basis that agency has failed to maintain such Accreditation. Agency must provide United Way with proof of its Accreditation within three (3) business days of United Way's written request.

**Non-Accredited Agencies:** Agency will complete the necessary Accreditation through Nonprofits First, Inc. within 18 months of this Agreement; however, if agency and United Way have previously entered into any similar agreements for a prior fiscal year, then this deadline shall instead be the end of the 18<sup>th</sup> month following that first of such agreements. Renewed funding will be considered only if agency is making sufficient progress toward achieving such Accreditation and may be denied solely on the basis that agency has failed to do so. Whether agency is making sufficient progress will be determined solely by United Way in its sole discretion based, among other things, on whether agency is adhering to the requirements, milestones and deadlines within the Agency Accreditation Agreement between agency and Nonprofits First, Inc.

## Appendix C

### *Certificate of Compliance*

Agency \_\_\_\_\_

Executive Director (please print) \_\_\_\_\_

Board Chairperson (please print) \_\_\_\_\_

Date \_\_\_\_\_

As part of this Request for Application (RFA) process, United Way of Palm Beach County requires you to certify on behalf of the agency that the following statements are true. Each statement requires the original signatures of the Executive Director and Board Chairperson. If a statement is not true, do not sign for that statement.

By your execution below, you do hereby certify that:

(I.) The agency is (i) incorporated as a non-profit organization in the State of Florida and (ii) tax-exempt under Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and has filed on a timely basis its Form 990 and all other reports required to maintain such status.

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Board Chairperson

(II.) The agency's Florida Department of Agriculture Charitable Contributions letter is current.

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Board Chairperson

(III.) There are no tax liens against the agency. The agency owes no delinquent federal or state payroll taxes or past due payments to other governmental agencies.

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Board Chairperson

(IV.) There was no adverse action against the agency by regulatory, licensing, or oversight agencies to date in 2023-2024.

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Board Chairperson

(V.) All licenses necessary to provide the agency's programs and services are in full force and effect.

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Board Chairperson

(VI.) Any court or other governmental authority made no finding of discrimination against the agency in 2023-2024.

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Board Chairperson

(VII.) The agency adheres to United Way of Palm Beach County Standards of Accountability.

\_\_\_\_\_  
Executive Director

\_\_\_\_\_  
Board Chairperson

## **Appendix D**

### ***Application Review Criteria***

The following criteria are used during the review of applications submitted to United Way of Palm Beach County (UWPBC) as part of the Community Impact Request for Applications (RFA) process.

#### **Need for Program (10 Points)**

- The program focuses on the problem, need, or issue that is addressed in the Request for Applications (RFA).
- The applicant uses local data to demonstrate how the problem, need, or issue impacts Palm Beach County.
- The application describes why it is timely and/or urgent to address the identified need.

#### **Program Target Population (10 points)**

- The application clearly describes the program's target population and geographic location, including demographic data on age, gender, race/ethnicity, household income (including Federal Poverty Level and ALICE), veteran status, disability/special needs status, and zip code.
- The program's target population aligns with the target population identified in the RFA.

#### **Program Approach and Design (15 Points)**

- The application describes how the program aligns with one specific strategy identified in the RFA.
- The program's overall approach and design reflect evidence-based research, including the best practices identified in the RFA.
- The application describes why the chosen approach is the best way to help the target population reach the intended results.
- The application provides details about program eligibility requirements.

#### **Program Scope of Work (15 Points)**

- The application clearly describes the activities and services the program will provide to the target population, including when, where, and how often activities and services are provided.
- The program's activities and services are comprehensive, well-designed, and logical given the identified need, target population, and geographic service area.
- The application clearly demonstrates how program activities and services will lead to the desired goal and achievement of key performance indicators.
- The application indicates the number of program participants that will be served during the fiscal year.



**Program Evaluation Approach (10 Points)**

- The application describes steps taken to ensure the program is having the desired impact on the target population.
- The application describes how the program will ensure the activities and services described in the scope of work are being delivered.
- The application describes the program’s data collection process, including the measurement tool(s) used to collect data, staff responsible for collecting data, frequency of data collection and reporting, and where data is stored.

**Program Evidence of Effectiveness (5 Points)**

- The application demonstrates that the program had previous success in addressing the needs of the target population.
- The application provides results of any recent audits or evaluations that demonstrate success of the program.
- The application indicates if the program has received any awards, special recognition, or been identified as a best practice approach.

**Program Innovation (5 Points)**

- The application demonstrates that the program unique or creative.
- The application describes how the program differs from existing programs in the area that serve the target population.

**Program Sustainability (5 Points)**

- The application discusses the leveraging of resources and includes potential funding sources that can support the program when UWPBC funding ends.
- The sustainability plan is specific, realistic, and reasonable.
- The organization demonstrates a strong commitment to the program.

**Program Anticipated Challenges (5 Points)**

- The application discusses challenges and barriers that could make it difficult for the target population to achieve the key performance indicators identified in the RFA.
- The application describes a logical plan to address anticipated challenges and achieve the key performance indicators.