



United Way of Pierce County

Community Investment Request for Proposals **TRANSFORMATION FUND**

*Guidelines and Strategies for the
2025-2027 Community Investment Cycle*

Together, we will lift 15,000 households out of poverty by 2028

Applications are due by 5:00 p.m. on Friday, July 12, 2024

REQUEST FOR PROPOSALS

United Way of Pierce County (UWPC) supports partnerships that stabilize households and break down barriers to self-sufficiency. UWPC's community investments are focused on achieving our bold goal of helping to move 15,000 households out of poverty and into self-sufficiency by 2028. Investments are also focused on achieving a just, equitable, and inclusive Pierce County community where everyone has access to opportunities and the resources needed to thrive and achieve their greatest potential.

For the 2025-2027 Community Investment Cycle, we will be investing intentionally for impact that aligns with our vision for equity by focusing specifically on ten (10) communities rated as low equity on the Pierce County Equity Index as well as communities with the highest percentages of ALICE which reflect disparities in the distribution of wealth in our community. Additionally, UWPC will be investing the highest amounts for the most impactful partnerships and expanding access to funding for grassroots organizations that are innovating and engaged in capacity building.

TRANSFORMATION FUND

As we work toward goals such as racial and economic justice, these are symptoms of more deeply embedded systems and structures that marginalize entire communities. In order to achieve systems transformation, we need to transform the way we work for change. Transformation is about bringing something new into existence, not just rearranging what exists. Transformation is about compassion and collaboration with intention.

With this Request for Proposals (RFP) UWPC will provide Transformation Fund grant award(s) to qualified organizations or collaborations that can demonstrate the capacity to deliver a holistic service model designed to move households more effectively and efficiently toward self-sufficiency. As part of the strategy to support our bold goal of lifting 15,000 households out of poverty and moving them toward self-sufficiency, we are offering **up to two (2) Transformation Fund investments of \$100,000 per year (renewable for up to three years) for a total annual investment of \$200,000.**

Transformation Fund investments are designed to support:

1. Existing innovative and collaborative work providing excellent results in moving households toward self-sufficiency; or
2. A bold new idea that will result in measurable solutions to challenges and barriers facing ALICE households; **and**
3. Work that influences systems and policy change.

EXAMPLE: The Growing Resilience In Tacoma (GRIT) basic income project is supporting households in moving toward self-sufficiency while also providing data and stories to support changing the narrative around unconditional cash gifts as a workable solution to poverty.

The Transformation Fund will support:

- ✓ Organizations that are grounded in equity and inclusion;
- ✓ Clear and measurable connection to the bold goal
- ✓ Proximity to need/geographic focus areas
- ✓ Focus on whole person/household
- ✓ Ability to provide disaggregated demographic and self-sufficiency data
- ✓ Collaborative – able to identify key partners and track shared outcomes
- ✓ Innovative, human-centered approach or model

SERVICE STRATEGIES *(see Appendix A)*

- Homelessness/Housing Security
- Health & Wellbeing
- Language/Immigration Navigation
- Employment/Training

In addition to common outcomes and measurements for individual service strategies, Impact and Transformation Fund grantees will be required to collect and report on de-identified disaggregated data for both demographics and the UWPC Self-Sufficiency and Well-Being Matrix for **the following mandatory categories**:

1. **Food Security**
2. **Housing Security**
3. **Income Security**
4. **Employment/Training** *(when applicable – i.e., for clients who are on disability or retired this may not be applicable)*

REQUIREMENTS	TRANSFORMATION FUND
FUNDING RANGE (\$ AVAILABLE)	\$100,000
Measurable connection to the bold goal	✓
Commitment to equity and inclusion	✓
Proximity to need/geographic focus areas	✓
Focus on whole person/household	✓
Participation in Investment and Frontline Staff Cohort	✓
SSM assessment and disaggregate data (Transformational - required; Impact - optional if you have an equally robust way to measure progress toward bold goal)	✓
Collaborative (able to ID partners and track shared outcomes)	✓
Innovative, human-centered approach or model	✓

What is United Way looking for?

- Organizations willing to work in partnership with United Way and others in the community to ensure a **whole person/whole family approach** to programming/services
- Organizations focused on **client-centered approaches to service** provision
- Organizations **servicing those zip codes with the highest numbers of ALICE households** (asset limited, income constrained while employed) and areas identified as low equity (visit <https://www.uwpc.org/united-alice-united-way-pierce-county> to learn more about ALICE)
- Organizations **working cooperatively to remove barriers** to access and assistance with navigation of needed services
- Organizations with a clear **commitment to equity and inclusion** (visit <https://www.uwpc.org/racial-equity> to learn more about UWPC’s commitment to equity and inclusion)

TARGET POPULATIONS:

Based on data from the U.S. Census, the Pierce County Equity Index, the WA State ALICE Report, and South Sound 211, we have determined the following zip codes as target areas for investment. UWPC is prioritizing investments in programs or collaborations serving a high percentage of ALICE households (including those in poverty and low-income households). We will be targeting investments in the following zip codes with the highest percentages of ALICE households while also working to maintain a regional presence. We realize that ALICE lives throughout our county, and we strive to support ALICE in their own communities.

Target Zip Codes:

- 98404 – East Tacoma
- 98405 – Hilltop/Central Tacoma
- 98408 – Southeast Tacoma
- 98409 – South Tacoma
- 98433/39/99 – Lakewood/JBLM/Tillicum/Woodbrook/Springbrook area
- 98444/45 – Parkland
- 98465 – West Tacoma/U.P.
- Key Peninsula area

INVESTMENT STRATEGIES:

United Way of Pierce County's goal for this investment cycle is to invest in highly impactful organizations employing at least one of the following strategies, with a preference for those proposals demonstrating integrated and/or collaborative services employing more than one of the strategies below. ***Please note that organizations must provide the service(s) being measured and reported on, rather than services for which your organization's staff provides referrals to other organizations.***

Funding Requirements

Annual grants for the Transformation Fund will be awarded in amounts no less than \$100,000 per proposal. All applicants must align with at least one (1) of the service strategies listed above. We are striving for the greatest impact through a focus on performance, transparency, and accountability.

All Community Impact Investments are made through an open and competitive RFP process.

Requirements for Funding

To qualify for United Way of Pierce County funding, organizations must:

1. Qualify as a nonprofit organization with 501(c)(3) status or have a verifiable 501(c)(3) fiscal agent
2. Have an active Board of Directors and be fiscally and administratively sound
3. Programs or services must operate within Pierce County boundaries
4. Have the capacity to advance the goals of UWPC as described in the RFP and meet data reporting requirements
5. Comply with the USA Patriot Act and other counterterrorism laws
6. Comply with all provisions of the Americans with Disability Act and operate by policy and practice without discrimination based on age, race, gender, religion, sexual orientation, disability, economic status, cultural heritage, or national origin

Capacity to Delivery on Outcomes

Potential investment partners may include a wide array of organizations. Following are the criteria that will guide United Way's decision-making when considering investments. These criteria are intended to be flexible enough to include grassroots organizations.

The organization regularly measures its performance against a clear set of goals.

- Is innovative, resourceful, and results-oriented in solving a specific social problem
- Core strategies align with United Way of Pierce County’s bold goal
- Demonstrates compliance with all local, state, and federal legal requirements related to financial matters – move under requirements

Grant Terms

Community Impact Investment grants are renewable for a term of up to three years, **dependent on program performance, organization solvency, and funding availability**. The 2025-2027 investment cycle runs from January 1, 2025 through December 31, 2027. United Way of Pierce County may adjust grant award amounts based on available funds. Organizations will be notified of any proposed change to funding amounts at least 30 days prior to the start of the next funding year (12/1/2025 and 12/1/2026).

Grant Conditions

United Way funding is based on the premise that partnership and collaboration are the cornerstones of our effort to create lasting change in our community. United Way recognizes the rights and authority of organizations, through their governing bodies, to determine their own policies and manage their own programs. In that spirit, United Way delineates the following grant conditions to be acknowledged by grantees as part of their obligation upon acceptance of investment funding:

1. Annual updating of the organization’s Sound Sound 211 information
 2. Communicate in writing to UWPC’s Community Impact team, as early as possible, whenever changes – which might affect organization’s or program’s ability to deliver the results outline in its proposal – have occurred, including changes in key staff.
 3. Funded partners are expected to participate in the Community Investment Cohort meetings, and if appropriate have representatives of their frontline staff attend the Frontline Staff meetings.
1. Financial records are to be submitted annually for investment partners according to the following conditions:
 - a. IRS Form 990 or 990-EZ
 - b. Financial statements – based on organization budget size (Line 12 on IRS Form 990):

	Category A	Category B	Category C
Operating Budget Size	Annual Revenue less than \$100,000	Annual Revenue greater than \$100,000 but less than \$749,999	Annual Revenue greater than \$750,000
Required Materials*	<ul style="list-style-type: none"> • Financial Statement Compilation prepared by a CPA • Current year budget 	<ul style="list-style-type: none"> • Reviewed Financial Statement prepared by a CPA • Current year budget 	<ul style="list-style-type: none"> • Audited Financial Statements prepared by a CPA • Current year budget

*** If there are extenuating circumstances and your organization is unable to provide required documentation, please reach out to us to discuss an appropriate alternative.**

Reporting Requirements

The following reporting requirements will be part of the investment partner’s obligations upon acceptance of grant funding:

- **One Site Visit** during the three-year cycle
- **Year-End Program Performance Reports** are to be submitted annually, on or before:
 - Year 1 – January 30, 2026
 - Year 2 – January 29, 2027
 - Year 3 – January 31, 2028

Transformation Fund year-end performance reports will include reporting on the common outputs and outcomes for strategies selected in the application, disaggregate de-identified demographics and mandatory self-sufficiency categories, and a narrative report including a success story.

Application Submission

Proposals must be received by UWPC, through the online application system, on or before Friday, July 12, 2024 at 5:00 pm PST. Complete application requirements and access to the online application systems are available on our website at <https://www.uwpc.org/community-impact-investment-fund>

Community Impact Staff Contacts

The Community Impact Team is responsible for UWPC’s Community Investment process. Technical assistance is available for anyone in need of support with outcome measures, evaluation, and other questions. Please reach out to clarify alignment, if you are unsure about whether or not a program or service fits within our focus areas.

Name	Title	Phone	Email
Shawn Paton	Vice President of Community Impact	(253) 597-7492	shawnp@uwpc.org
Kelvin (KC) Ceasar	Sr. Manager, Policy and Community Engagement	(253) 597-4257	kelvinc@uwpc.org
Leah Martin	Impact & Engagement Coordinator	(253) 682-1810	leahm@uwpc.org

TRANSFORMATION FUND OUTCOMES & INDICATORS FRAMEWORK

Organizations funded for the 2025-2027 investment process will become part of the Community Investment Learning Cohort designed to help us network, share best practices, and learn together while achieving positive results for families in Pierce County. Partners receiving investments will utilize common outcomes and performance measures to quantify the degree to which those served are better off as a result of targeted service strategies. By establishing common ground across a variety of organizations, as well as through collection and evaluation of shared data measurements, United Way will be able to measure the success of investments while shining a light on the needs that still exist.

Please review the information below to determine which categories best measure and demonstrate the impact of the program/project your organization is submitting for potential investment.

HOMELESSNESS/HOUSING SECURITY			
COMMON OUTCOME	MEASURES/OUTPUTS	CORRESPONDING INDICATORS	ALIGNMENT WITH WA STATE 10-YEAR PLAN
Increase # of individuals/households achieving housing security	<p><u>Shelter/Transitional/ Supportive Housing:</u></p> <ul style="list-style-type: none"> # of unduplicated individuals sheltered/housed # of bed nights provided (emergency/DV shelters only) Average length of stay (# of days) # of individuals/households transitioning to permanent/stable, affordable housing 	# of individuals/households moving from crisis/vulnerable to stable or better for Housing Security as a result of funded program/project	<p>5d. Increase the number of emergency, transitional, and permanent supportive housing options</p> <p>7i. Eliminate housing, education, and employment barriers and invest in stronger, better-coordinated exit and re-entry policies, services, and programs</p>
	<p><u>Homelessness Prevention Services:</u></p> <ul style="list-style-type: none"> Type of homelessness prevention resource provided (<i>rental, utility, water, mortgage, etc.</i>) # unduplicated individuals/households served by type of prevention service # served reporting they were able to maintain housing as a result of service(s) 		

HEALTH & WELL-BEING			
COMMON OUTCOME	MEASURES/OUTPUTS	CORRESPONDING INDICATORS	ALIGNMENT WITH WA STATE 10-YEAR PLAN
Increase in # of individuals who improve physical health status as a direct result of services/programming	<p><u>Health Care:</u></p> <ul style="list-style-type: none"> Type of health service(s) provided # of unduplicated individuals receiving physical health services (<i>includes dental, vision, etc.</i>) by type of service # of patients served who demonstrate improved health as a direct result of funded program/project 	# of individuals/ households moving from crisis/vulnerable to stable or better for Health or Behavioral Health as a result of funded program/project	5g. Improve access to behavioral health prevention, treatment, and recover support services
<p>Increase in # of individuals who improve behavioral health status as a direct result of services/programming</p> <p>Decrease in # of individuals using/misusing substances as a direct result of services/programming</p>	<p><u>Behavioral Health Care:</u></p> <ul style="list-style-type: none"> # of unduplicated individuals receiving behavioral health services (<i>mental health tx, counseling, etc.</i>) # of unduplicated individuals receiving substance use disorder tx services # served who demonstrate improved behavioral health as a direct result of funded program/project 		
LANGUAGE/IMMIGRATION NAVIGATION			
COMMON OUTCOME	MEASURES/OUTPUTS	CORRESPONDING INDICATORS	ALIGNMENT WITH WA STATE 10-YEAR PLAN
Increase # of individual who overcome language/immigration barriers and/or improve English language skills as a direct result of services/programming	<p><u>Language/Immigration Navigation Services:</u></p> <ul style="list-style-type: none"> Type of service provided (<i>i.e., ESL classes, citizenship classes, legal support, translation services, etc.</i>) # of unduplicated individuals served by type of service 	# of individuals/ households moving from crisis/vulnerable to stable or better for Language/ Immigration Navigation as a result of funded program/project	3a-ii. Strengthen literacy programs and services for children and adults with limited English proficiency across the entire education and workforce development pipeline

EMPLOYMENT/TRAINING			
COMMON OUTCOME	MEASURES/OUTPUTS	CORRESPONDING SSM INDICATORS	ALIGNMENT WITH WA STATE 10-YEAR PLAN
Increase # of individuals who improve their employment status as a direct result of services/ programming	<p><u>Employment and Training:</u></p> <ul style="list-style-type: none"> • Type of employment or training services provided (<i>job readiness, certificate program, apprenticeship employment placement, career coaching, etc.</i>) • # of unduplicated individuals served by type of prevention service • Type of material supports provided (<i>things needed to overcome barriers to employment such as ID, costs for testing/fees, work boots, work clothes, tools, equipment, etc.</i>) • # of unduplicated individuals receiving material supports by type of support • # served who report obtaining/maintaining/ advancing in employment 	# of individuals moving from crisis/vulnerable to stable or better for Employment/Training as a result of funded program/project	8a-i. Expand mentorship and career-connected learning for people of color, LGBTQIA+, refugees and immigrants, people with disabilities, and rural communities
SOCIAL CAPITAL			
COMMON OUTCOME	MEASURES/OUTPUTS	CORRESPONDING INDICATORS	ALIGNMENT WITH WA STATE 10-YEAR PLAN
Increase # of individuals/households who report increased feelings of community support and belonging as a direct result of services/programming	<p><u>Social Capital:</u></p> <ul style="list-style-type: none"> • Type of service provided (<i>i.e., support groups, structured activities, community events, etc.</i>) • # of unduplicated individuals served by type of service 	# of individuals/ households moving from crisis/vulnerable to stable or better for Social Capital as a result of funded program/project	6f. Revamp policies, programs, and practices to inspire hope and build resilience. The emerging science of hope and resilience suggests that it is one of the most essential elements of well-being and success.