Equity Through Technology Fund

Description, Application Questions and Reporting Requirements

Fund Eligibility

The fund is available to Racine County-serving nonprofits. To be eligible to apply for funds, organization must meet all of the following criteria:

- Serves residents of Racine County, WI.

- Able to provide (upon request) detailed board-approved budgets and financial reports, including an audit or audited financial statements as required by State of Wisconsin Statute 202.12 (1)(b).

- Has been legally incorporated for at least six months.

- Is tax exempt as described in section 501(c)(3) of the Internal Revenue Code.

- Is governed by a local voluntary board of directors.

- Maintains a policy of non-discrimination and equal opportunity and complies with the Americans with Disabilities Act.

- Is in compliance with all funding agreements, policies and procedures if currently receiving any funds from United Way

UWRC does not fund

- Organizations that discriminate on the basis of race, ethnicity, national origin, age, religion, gender or sexual orientation.

- Political causes, candidates, organizations or campaigns.

- Programs and projects that benefit a single individual. All expenditures must support activities, services, or resources that serve a broader group or community of Racine County residents.

- Sponsorship requests are not accepted through this fund.

Fund Description and Goals

United Way of Racine County's Equity Through Technology Fund invests in projects and programs that aim to increase equitable outcomes and reduce disparities for historically

marginalized populations in Racine County through the use of technology. The fund is made possible through the generosity of Microsoft Corporation.

The fund supports efforts that:

- Create equitable access to technology, information and/or opportunities
- Use technology to mitigate barriers to participant success
- Support local organizations to better serve their clients through the use of technology

While achieving at least one of the following outcomes:

- Increase in job-readiness skills
- Increase in earning potential through increased knowledge/skills that facilitate access to jobs with higher wages
- Increase in educational attainment (pre-Kindergarten and K-12)
- Increase in access to and utilization of physical and/or mental health services
- Increase in the organization's capacity to serve clients efficiently and effectively

We anticipate the majority of requests will propose enhancements to existing programs, rather than the creation of new efforts.

Key Terms

Equity and *historically marginalized population* are key terms related to this funding opportunity. The definitions used for these terms for the purpose of this fund are as follows:

Equity: Creates conditions that allow all to reach their full potential. It is just and fair inclusion. Equity is not equality.

Marginalized populations: Individuals, groups, and communities that have historically and systematically been–and continue to be–denied access to services, resources and power

relationships across economic, political, and cultural dimensions because of systemic, durable, and persistent racism, discrimination and other forms of oppression. Historically marginalized populations are disproportionately affected by inequities.

Historically marginalized populations are often identified based on their race, ethnicity, socio-economic status, geography, religion, language, sexual identity, and disability status, and include members of the following groups/communities:

- African American/Black
- Indigenous
- Immigrant or refugee
- Latinx/Hispanic
- LGBTQIA+
- People of color

- Veterans
- Women
- Seniors
- Individuals with cognitive or physical differences

Request Guidelines

- The minimum amount for Equity Through Technology Fund requests is $1,000. The maximum request amount is $15,000.
- Organizations may be granted a maximum of one Equity Through Technology grant within a single funding cycle.
- Requests should demonstrate thorough planning that will result in successful implementation.
- If an organization has received an Equity Through Technology grant from a previous cycle and wishes to apply again, all prior projects from the previous cycle must be completed or the new application must be for a distinctly different program or project.
  - *Completed project* is defined as one in which all work has been completed, the final project and financial reports have been submitted, and any unused funds have been returned to United Way of Racine County.

- o Continued or repeated funding for a project is not guaranteed, even if previous grants were successfully implemented.

Application Timeline

Applications must be submitted online using the form at UnitedWayRacine.org/ETTapplication.

Following submission of the application, the individual listed as the primary contact will receive an auto-generated confirmation email. The primary contact must respond promptly to this email with the required attachments:

- Proof of IRS determination of 501(c)3 status
- Completed United Way of Racine County Budget Template (see Appendix A)
- Letters of support (if applicable)
  - o Letters of support are highly encouraged when the proposed program or project relies on collaboration with another organization or entity.
  - o Letters should clearly outline the parter's role, responsibilities and commitment to the program's success and the achievement of proposed outcomes.

Failure to submit the required attachments will render the application ineligible for review.

Budget Requirements

All fund applicants are required to submit a complete and detailed budget and budget narrative using the budget template available at UnitedWayRacine.org/ETT. (See Appendix A)

- Allowable budget items include, but are not limited to hardware, software, accessories, installation fees, warranties and training.
- Budget details should include product sources, quantities, unit costs and calculations.
- If the total budget for the project exceeds the amount requested from UWRC, you must confirm in your application that you have secured the remaining funds. If you have not, you must include a narrative explanation.

- Funds requested must be in whole dollar amounts.
- Applications with misalignment between the request narrative and request budget will not be considered for funding.
- Failure to submit the budget template will render the application ineligible for review.

Non-allowable Expenses

- Funds cannot be used to cover expenses incurred prior to funding notification.
- Funds cannot be used to supplant existing budgeted items (e.g. existing organization dollars already allocated for the project/program/event cannot be displaced by United Way of Racine County Equity Through Technology dollars and reallocated for other organizational expenses).

Funding Approval Process

Incomplete applications, applications that do not meet the eligibility requirements and applications with misalignment between the request narrative and request budget will not be considered for funding.

Proposals from organizations not in compliance with requirements for other United Way funds, current funding agreements and/or the community investment policies and procedures at the time of review will not be reviewed for funding.

The review process is conducted and monitored by United Way of Racine County staff, board members and the Community Investment Committee (CIC).

Requests are approved as follows:

- Requests up to $10,000 are approved by the president, board chair and vice chair of community investment or CIC.

- Requests for more than $10,000 are approved by CIC and either the United Way executive committee or board of directors.

This is a competitive fund and requests that meet requirements are not guaranteed funding. Equity Through Technology funding is available until the available dollars are exhausted. Priority will be given to organizations or projects that have not previously received Equity Through Technology funding. United Way of Racine County reserves the right to adjust the fund structure at any time.

Grant Awards

- All applicants will be notified of the funding decision whether or not their request is approved.
- Upon funding notification, grantees will be required to sign a funding agreement (Memorandum of Understanding), which will outline responsibilities and expectations including but not limited to:
  - Communication standards
  - Co-branding and recognition opportunities
  - Reporting timelines and requirements
- Grantees who do not already have a current W-9 on file with UWRC must submit one prior to the release of any awarded funding.
- Awarded funds will be released in a single lump-sum payment upon the execution of the MOU.

Reporting Requirements

United Way may require periodic ad-hoc updates via email to ensure ongoing communication and progress monitoring. All grantees are required to submit a final report within one year of funding notification or within 60 days of completion of the project/program, whichever comes

first. Late and/or incomplete reports will negatively impact the organization's eligibility for future United Way of Racine County funding. Submitted reports will be shared with United Way staff, board and community investment volunteers, and may also be included in United Way reports, media and publications.

Additional progress reporting requirements will be established collaboratively between United Way of Racine County staff and the grantee and will be outlined in the Memorandum of Understanding (MOU).

The final report will include, at a minimum, the following components:

- A narrative that demonstrates indirect and direct impact of the program/project
- The total unduplicated number of individuals served
- Demographic information of participants (see Appendix B)
- A financial report documenting grant fund expenditures, comparing proposed to actual expenses using the original budget template as a starting point (see Appendix A)
- Photos that demonstrate program impact

Application Questions

Eligibility requirements

These questions apply to the applicant organization, or their fiscal agent, if applicable.

At any point, if eligibility screening fails, the organization should not continue the application process.

- Does your organization serve residents of Racine County, WI?
- Is your organization able to provide detailed financial reports and board-approved budgets upon request?
- Has your organization been legally incorporated for at least six months?

- Is your organization tax exempt as described in section 501(c)(3) of the Internal Revenue Code?

- Are you able to provide an audit or audited financial statements as required by the State of Wisconsin Statute 202.12 (1)(b)?

- Is your organization governed by a voluntary board of directors?

- Does your organization maintain a policy of non-discrimination and equal opportunity, and comply with the Americans with Disabilities Act?

- Can your organization attest to abiding to the Patriot Act Anti-Terrorism Compliance requirements?

Organization information

- Organization legal name, organization name as you'd like it to appear in print, website address, phone, address, city, state, zip code

- Executive director/CEO name, title, email address, phone

- Board president/board chair name, company/affiliation, email address and phone

- Primary contact name, title, email address and phone (may be the executive director)

- Secondary contact name, title, email address and phone (cannot be the same as the primary contact)

- Organization/fiscal agent EIN

- Year incorporated

- Organization logo (if one exists)

- Organization social media handles (if available)
    - Facebook
    - Instagram
    - LinkedIn

Fiscal agent information

- Do you have a fiscal agent?
    - If yes, the following information is required.
        - Fiscal agent legal name, executive director/CEO name, email address, phone number, website address, phone number, address, city, state, zip.
        - A written agreement between the applicant organization and its fiscal agent that describes the nature of the partnership, outlines the fiscal responsibilities of the agreement and specifies that the agreement applies to this project/program.
- All organizations/fiscal agents must provide proof of IRS determination of 501(c)3 status.

Application questions

- Name of project/program
- Dollar amount requested. *This amount must match the amount requested from United Way on the budget template.
- If the cost of this project/program is greater than the amount requested from UWRC, do you have sufficient resources secured to fully implement the project/program as presented?
- Is this a new program or an enhancement to an existing program?
    - If an enhancement, is this program currently funded by United Way of Racine County?
- How many unduplicated individuals will be directly served through this funding?

- Who is the primary marginalized population that will directly benefit from this technology?

  - African American/Black
  - Indigenous
  - Immigrant or refugee
  - Latinx/Hispanic
  - LGBTQIA+
  - People of color

  - Veterans
  - Women
  - Seniors
  - Individuals with cognitive or physical differences

- Are there additional marginalized populations that will benefit from this technology?

- Provide a brief description (3-4 sentences) of the program/project. If you only had a minute to explain your program/project to someone, what would you want them to know?

- Describe the technology for which your organization is seeking funding.

- How will the addition of technology support an increase of equity or inclusion, or a reduction in disparities for the specific marginalized population identified above?

- What is the project timeline? Include major milestones. Projects must be completed within twelve months of funding notification.

- What is the focus area of the project/program?

  - Increase in job-readiness skills
  - Increase in earning potential through increased knowledge/skills that facilitate access to jobs with higher wages
  - Increase in educational attainment (pre-Kindergarten and K-12)
  - Increase in access to and utilization of physical and/or mental health services
  - Increase in the organization's capacity to serve clients efficiently and effectively.

- For your project/program's focus area, select the indicator(s) you will use to measure impact.

  - Increase in job-readiness skills (choose at least 4)

    i.   Number of participants who demonstrate improvement in time management abilities

    ii.   Number of participants who demonstrate increased work ethic

    iii.   Number of participants who demonstrate effective use of problem-solving strategies

    iv.   Number of participants who demonstrate growth in critical thinking

    v.   Number of participants who exhibit increased leadership behaviors

    vi.   Number of participants who report increased personal growth

    vii.   Number of participants who feel more confident in their professionalism

    viii.   Number of participants who demonstrate increased/improved decision-making skills

    ix.   Number of participants who demonstrate increased emotional intelligence

    x.   Number of participants who feel more confident communicating with others

- Increase in earning potential through increased knowledge/skills that facilitate access to jobs with higher wages (choose at least 1)

    i.   Number of participants who complete an industry-recognized certification

    ii.   Number of participants who earn a credential

    iii.   Number of participants who complete hands-on, industry-specific upskilling

    iv.   Number of participants who complete an industry-specific course

- Increase in educational attainment (pre-Kindergarten and K-12) (choose at least 1)

    i.   Number of participants who demonstrate measurable improvement in reading, writing or literacy skills

    ii.   Number of participants who demonstrate measurable improvement in math or numeracy skills

     iii. Number of participants who demonstrate improvement in gross or fine motor skills

     iv. Number of participants who demonstrate growth in critical thinking

     v. Number of participants who demonstrate increased proficiency in information, media or technology skills

     vi. Number of participants who demonstrate improvement in STEAM-realted knowledge or skills

- Increase in access to and utilization of physical and/or mental health services (choose at least 1)

     i. Number of participants who receive acute care services

     ii. Number of participants who consistently utilize chronic disease management services

     iii. Number of participants who receive medication management services

     iv. Number of participants who receive occupational therapy services

     v. Number of participants who increase their utilization of behavioral health therapy

     vi. Number of participants who increase their utilization of cognitive therapy

     vii. Number of participants who utilize support groups

- Increase in the organization's capacity to serve clients efficiently and effectively (choose at least 3)

     i. Number of additional clients served because of new technology

     ii. Number of hours of staff effort redirected to other tasks because of new technology

     iii. Number of dollars saved as a result of efficiency created with the new technology

     iv. Number of staff fully trained to use the technology integrated because of Equity Through Technology funding

     v.   Number of staff who report increase in productivity and/or time saved because of the technology integrated through Equity Through Technology funding

     vi.   Number of employees who report increased job satisfaction because of the technology integrated through Equity Through Technology funding

- For <u>each indicator</u>:
  - Describe the specific activities that support achievement of the indicator.
  - The anticipated number of participants expected to meet the indicator.
- How will you measure progress towards indicator achievement? Include a description of the measurement tool(s) you will use.
- Is there any additional information you would like the review committee to consider?
- Budget: I will respond to the automatic email following submission with a detailed Equity Through Technology Fund budget that includes quantities, unit costs, and calculations. The required budget template is available at <u>UnitedWayRacine.org/ETT</u>. Budgets submitted in any other format will not be accepted.

Reporting Questions

- Organization name
- Project/program name
- Executive director/CEO name
- Name and email address of person completing report
- Describe any deviance from proposed activities to actual activities.
- For progress reports only: Are you on track to your proposed timeline? If no, please explain.
- Number of unduplicated individuals that were served to date by this technology
- Demographics of individuals served (see Appendix B for demographic categories required in report)

- Describe how the addition of technology supported an increase of equity or inclusion, or a reduction in disparities for the specific marginalized population served by your project/program?

- For your project/program's focus area, select the indicator(s) you used to measure impact. Enter the number of participants who achieved that indicator. Refer to your application for the specific indicators you proposed. You must report on all indicators selected in your application.

  o Increase in job-readiness skills

  o Increase in earning potential through increased knowledge/skills that facilitate access to jobs with higher wages

  o Increase in educational attainment (pre-Kindergarten and K-12)

  o Increase in access to and utilization of physical and/or mental health services

  o Increase in the organization's capacity to serve clients efficiently and effectively

- Provide photo(s) (with media release) that demonstrates the impact of the grant.

- Provide a 2-3 sentence statement of impact that can be used as a stand-alone quote. Include the name and title of the person quoted.

- Provide links to any social media posts, media releases, marketing collateral, etc. related to the project/program.

- Is there any additional information you would like to report?

- For final reports only: A financial report that documents grant fund expenditures. The financial report should compare proposed to actual expenses, using the original budget template document as the starting point. See Appendix A.

APPENDIX A

United Way of Racine County - Equity Through Technology: Example Budget

Description of expense	Calculation (Include sources, quantities and unit costs)	Total amount (proposed; in full dollar amounts)	Actual amount expended (to be completed at end of project)
Supply 1	10 at 4.99 each (Home Depot)	$50	
Supply 2	1 at 279.49 each (Best Buy)	$280	
Class instructor	3 at 3 hours each at $13/hour	$117	
		$0	
		$0	
TOTAL		$447	
Amount requested from United Way		$400	

United Way of Racine County - Equity Through Technology: Example Financial Report

Description of expense	Calculation (Include sources, quantities and unit costs)	Total amount (proposed; in full dollar amounts)	Actual amount expended (to be completed at end of project)
Supply 1	10 at 4.99 each (Home Depot)	$50	$55.79
Supply 2	1 at 279.49 each (Best Buy)	$280	$273.25
Class instructor	3 at 3 hours each at $13/hour	$117	$117
		$0	
		$0	
TOTAL		$447	$446.04
Amount requested from United Way		$400	$400

APPENDIX B

Instructions for reporting participant demographics

- For each demographic category, enter the number of participants. Do not leave any fields blank.

- Enter 0 when appropriate.

- The sum of each demographic category should equal the total number of unduplicated participants TO DATE.

- Declined to share = You made an attempt to collect this information and the participant actively chose not to respond.

- Unknown = You could not collect this information.

- If you have unknown demographic data, include an explanation in the "Additional participant demographic information" box at the end of the demographic section.

Participant demographics

- Briefly describe who is included in the group of participants whose demographics are included in this report. (Who is part of your data set?)

- Total number of unduplicated participants.

- Participant zip code
    - 53108
    - 53126
    - 53177
    - 53402
    - 53403
    - 53404
    - 53405
    - 53406
    - 53105
    - 53139
    - 53167
    - 53182
    - 53185
    - Declined to share zip code
    - Unknown zip code

- Participant age
  - 0-5 years old
  - 6-17 years old
  - 18-44 years old
  - 45-64 years old
  - 65+ years old
  - Declined to share age
  - Unknown age

- Participant race
  - African American/Black
  - American Indian and Alaskan Native
  - Asian
  - Native Hawaiian and other Pacific Islander
  - White
  - Two or more races
  - Other race not listed
  - Declined to share race
  - Unknown race

- Participant ethnicity
  - Hispanic or Latino
  - Not Hispanic or Latino
  - Other ethnicity not listed
  - Declined to share ethnicity
  - Unknown ethnicity

- Participant gender
  - Male
  - Female
  - Transgender
  - Nonbinary
  - Other gender not listed
  - Declined to share gender
  - Unknown gender

- Participant economic status
  - Extremely low-income
  - Very low-income
  - Low-income
  - Other
  - Declined to share income
  - Unknown income

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Use the following information to determine participant economic status. Income levels are based on the 2024 Poverty Guidelines for the 48 Contiguous States and the District of Columbia, Federal Register document 87 FR 3315.

Household annual income/ household size	Extremely low-income Less than 100% of poverty	Very low-income Less than 185% of poverty (Qualifies for Free and Reduced-Price Lunch (FRPL))	Low-income Less than 250% of poverty	Other Over 250% of poverty
1	$15,060	$15,060-$27,861	$27,861-$37,650	$37,650 +
2	$20,440	$20,440-$37,814	$37,814-$51,100	$51,650 +
3	$25,820	$25,820-$47,767	$47,767-$64,550	$64,550 +
4	$31,200	$31,200-$57,720	$57,720-$78,000	$78,000 +
5	$36,350	$36,350-$67,673	$67,673-$91,450	$91,450 +
6	$41,960	$41,960-$77,626	$77.626-$104,900	$104,900 +
7	$47,340	$47,340-$87,579	$87,579-$118,350	$118,350 +
8	$52,720	$52,720-$97,532	$97,532-$131,800	$131,800 +