



**Earn It! Keep It! \$ave It! Community Impact Grant Application
Unemployment Insurance Benefits Access & Education Capacity Building Project**

Each year, thousands of Monterey County seasonal workers become unemployed as the peak tourism and harvesting season ends. While eligible to draw on unemployment insurance, many of these workers lack the English and/or technological proficiency to submit a benefits application. As a result, seasonal workers must attempt to complete the application and recertification on their own, or pay a preparer to complete the forms for them, which often results in in delayed or denied benefits and decreases the overall financial stability within our community. Seasonal workers need a trusted source to educate them on how to apply for, and maintain their unemployment status for the months they are out of work.

In May 2016, the United Way Monterey County (UWMC) Board of Directors authorized the release of a Request for Proposals (RFP) to increase the financial stability of working families in Monterey County. Grant funds would be used to increase the number of seasonal workers who access unemployment insurance benefits through application assistance and education between November 2016 and June 30, 2017. Up to \$5000 of funding will be granted to one (1) eligible organization serving each of the four (4) regions of Monterey County. The organizations selected will have demonstrated experience providing high quality and culturally competent services to achieve the following objectives:

- Assist recently unemployed seasonal workers to submit accurately completed unemployment insurance benefits for 10 hours a week, up to 250 hours total for the period.
- Assist unemployed seasonal workers approved to receive unemployment insurance benefits to maintain those benefits through successful submission of recertification
- Increase the capacity of individual seasonal workers to submit future benefit applications independently
- Attend training provided by Employment Development Department on UI benefits application filing and assistance for granted agencies and partners.

The below timeline outlines key dates and activities related to this RFP:

Application Period	October 18, 2016 -November 4, 2016
Last Day to Submit Questions (phone or email)	October 31, 2016
Proposals Due	November 4, 2016
Review and Evaluation	November 7, 2016 - November 10, 2016
Notification of selection/non-selection	November 14, 2016 (expected)
Project Start/End Dates	November 15, 2016 – June 30, 2017

Proposal Contact

Proposals will only be accepted via email.

- Email to: Yuri Anderson – yuri.anderson@unitedwaymcca.org
- Telephone at: (831) 372-8026

Email is the preferred method of submitting questions regarding this RFP.

Eligible Organizations

To be eligible for funding, applicants must be classified as a private or public non-profit organization that qualifies for tax exemption under section 501 of IRS Code of 1986, including faith-based and community organizations. Educational, government, for-profit and Section 501(c)(4) organizations are not eligible to apply. An applicant that applies on behalf of a group of organizations is responsible for ensuring all participants within their collaborative adhere to grant requirements. Lead applicants are responsible for ensuring collaborative members understand the role they play in delivering a successful program. The lead applicant is the only organization that UWMC will release funds to if awarded. After the award is made, an agreement (contract or memorandum of understanding) is required between the grant recipient and its collaborative members (sub-recipients) to ensure adherence to program guidelines, that monies are expended on approved purposes and that appropriate documentation (programmatic and financial) is maintained. Organizations with offices/branches in various areas of Monterey County can apply for funding for *each* eligible office location.

Marketing

The grantee agrees to acknowledge and identify UWMC as a funder in all published materials, on websites and any other place where funders are listed, and to include UWMC's logo and follow UWMC's branding guidelines in all materials related to the programs and activities funded by the grant. United Way Monterey County will also ensure that the appropriate marketing and outreach is done to spread awareness about the services the Grantee is providing, in addition to listing service locations on the UWMC website.

Reporting

The Grantee is expected to file a monthly report to UWMC during the activity period. The report format will be finalized before grant funds are distributed. The Grantee is expected to submit a final report. The final report is due to UWMC no later than the outlined final report date, though the Grantee may submit the final report at any point after all grant funds are expended within the grant term.

Disclaimer

UWMC reserves the right to work with the grantee to modify proposals, to postpone awards or to seek additional proposals.

What to Include in the Application

1. Proposal Cover Form (Attachment A)
2. Narrative
3. Budget (Attachment B)
4. Signed Certifications (Attachment C)
5. IRS Determination letter
6. Current Board Roster
7. Staff Roster and Organization Chart
8. Reviewed/Audited Financial Statements (see the UWMC Audit Policy to determine which financial statements are required from your organization – Attachment D)
9. YTD Financial Statements
10. Current Organization Budget

Formatting

Proposals should be prepared using Arial 12 point font. Text should be single-spaced with 1-inch margins. Pages should be numbered sequentially and combined into a single PDF document and submitted electronically.

Narrative Instructions & Questions (Maximum 3 pages)

Prepare a proposal narrative that addresses the below questions. Your responses should include examples of organization and/or key staff experience to demonstrate there is sufficient knowledge and expertise to accomplish the objectives of the grant.

History & Experience

1. Briefly describe your organization's history and major accomplishments. Include a brief description of any programs/services offered.
2. Describe your organization's experience providing unemployment insurance (UI) application assistance, or a similar benefits access service, to: A) seasonal workers, B) persons who are unemployed, C) persons with limited English proficiency, and/or d) persons with limited technological proficiency.

Detailed Program Description & Proposed Activities

1. List the location(s) from which your organization will provide services and explain why it is best suited to meeting the needs of seasonal workers.
2. Discuss your organization's ability to connect program participants with other community and social benefit services available through your organization and/or the community at-large to increase their financial stability.

Staff Experience & Hiring

Describe the qualifications of lead project and administrative staff that will support the project. Discuss their education, relevant experience and training, and cultural competency as it relates to the population of focus. If you are proposing to hire staff/interns to provide these services, discuss the qualifications you will seek, recruitment methods to be used and anticipated timeline for onboarding and training. Outline the roles, responsibilities and anticipated time staff will work in the project.

Data Collection & Reporting

1. Indicate the number of people your organization proposes to assist file for unemployment insurance benefits between November 2016 and June 30, 2017 with the support of this grant.
2. Describe your organizational capacity to track, measure and report:
 - # of recently unemployed seasonal workers provided UI application assistance
 - % of applications accurately completed by your organization (as evidenced by either receipt of UI benefits or denial of benefits for reason other than inaccurate/incomplete application)
 - # of seasonal workers filing for UI benefits at your location
 - Average monthly UI benefit amount for all participants being assisted at your location
 - # of seasonal workers accessing UI to *maintain* benefits
 - Demographic data for applicants such as: age, gender, race/ethnicity, zip code of resident
 - Stories or snapshots of seasonal workers, and their daily life in Monterey County, in addition to how UI benefits keep them stable in the off-season. (Names can be changed)
3. How will your organization collect this information?

Note: United Way will provide reporting format documents prior to funds being distributed.

Budget

Use the attached template to prepare a budget. An excel version of this budget template can be downloaded from the UWMC website. Outline any in-kind contributions your organization or partners will make to the project (i.e. space, equipment, supplies, internet connectivity, etc.), including the estimated value of the contribution.

Note: Expenses incurred after the start of the project period, but before the full execution of a funding agreement may be reimbursed by UWMC. If a grant is not awarded, monies spent during this time are not reimbursable by UWMC. UWMC will not reimburse for expenses incurred related to preparation and submission of a project proposal. Expenses incurred in excess of the funds awarded are not reimbursable by UWMC.

Tips for Completing Your Application

When completing your application, it is important to adhere to the established requirements and guidelines. Listed below are a few tips that will lead to a strong application package.

- Stay within the guidelines when completing the narratives (# of pages, font, content, etc.).
- Number the pages of your narrative so reviewers can easily identify missing pages.
- Use good grammar.
- Include current statistics whenever possible and document the source.
- Use concrete examples to demonstrate organizational knowledge and expertise.
- Limit attachments to only vital information.
- Use templates when provided to ensure needed information is not overlooked.
- Ensure information agrees throughout the application.
- Complete all required forms, certifications, and narratives.
- Review the application prior to submission and use more than one reviewer.
- Prepare your application early. Don't wait until the last minute to submit.

Tips for Preparing a Project Budget

- Clearly depict how much money is needed and how it will be used.
- The budget should include sources (income) and uses (expenses) of funds.
- Sources of funds should include names of other funding organizations and amounts pledged or received as well as amounts still needed to be raised and possible sources for those funds.
- Indicate the time period covered by the budget.
- Make sure that you have accounted for all costs, such as benefits and payroll taxes as well as salaries, so that there will be no surprises mid-project.
- Finally, make sure all the numbers add up.