I. CHESTER COUNTY COMMUNITY FOUNDATION
GRANT PROPOSAL SUMMARY SHEET

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Date: October 27, 2023

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Contact Information

Organization Name: **United Way of Chester County**
Address: 150 John Robert Thomas Drive, Exton, PA
Phone: 610-429-9400
Website: www.uwchestercounty.org
Year Incorporated: 1980
FEIN: 23-2131877

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Board Chair Name: Carolyn Beam
Board Chair Approval (check here): X
Primary Contact Name: Kelly Cockshaw
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Organization Information:

Field/s of Interest:

___ Arts, Culture & Humanities   ___ Environment/Animal Welfare   ___Education
___ Health   _X_ Human Services   ___ Religion

Mission: The mission of United Way of Chester County is to unite people and mobilize resources to build better lives and stronger communities by focusing on improving the education, health, and financial stability of low-to-moderate income residents in our community.

Geographic Area Served: Chester County

Describe Population Served & Annual Number of People Served:

We fund nearly 70 programs, services, and initiatives to address the multifaceted needs of low-moderate income ALICE residents of Chester County, reaching over 100,000 people annually.

Annual Budget $1,112,375   (2023/24)

	_____8__ # of Full-Time Equivalent Paid Staff
____76___ % of budget for program expenses	_____22_ # of Board Volunteers
____14__ % of budget for administrative expenses	_____110 # of Active Non-Board Volunteers
____10__ % of budget for fundraising expenses	____1050_ # of Volunteer Hours
100 % total	

Top 3-5 funding sources: UWCC receives funding from individual donors, companies and local foundations.

Is this grant proposal for: Capacity Building ___ or General Operating X___

If Capacity Building Proposal, the focus is:

___Mission, Vision & Strategy   ___Governance & Leadership X_ Partnerships & Collaborations
___Fundraising, Development & Marketing X_ Technology   Other: Social innovation/data analytics

Grant Amount Requested from the Community Foundation: $_40,000_____

Proposal Summary:

Operating within a framework of social innovation can be critical for nonprofits—especially as they face growing pressures to serve more people in need and to deliver measurable results. United Way Chester County (UWCC) is shifting the paradigm by launching the Social Innovation Lab (SIL), designed for next generation nonprofits and social entrepreneurs. SIL is a collaborative center designed to jumpstart innovative and creative approaches to community problems. Social innovation will enable us to solve problems, create new opportunities, and improve the quality of life**.** Through a series of capacity-building programs in partnership with higher education technology teams and corporate technology leaders, UWCC will provide nonprofits with the knowledge, tools and collaboration needed to increase their impact in the community.

Nonprofit's history, goals, key achievements & distinctiveness

United Way of Chester County (UWCC) was formed in 1980 through the merger of several smaller United Funds and Community Chests that existed in the northern and central part of Chester County, PA at that time. UWCC is an independent, locally controlled S01(c)3, and is one of approximately 1,000 local United Ways throughout the United States, which are affiliates of United Way Worldwide. Here in Chester County, UWCC has been partnering with the corporate sector, civic leaders, and health and human service agencies to meet the social service needs of Chester County residents. The UWCC's Community Impact and Innovation Fund focuses on fighting for the education, health, and financial stability of low-to-moderate income residents in our local community. We fund nearly 70 programs, services, and initiatives to address people's multifaceted needs, touching the lives of nearly one out of every five Chester County residents, reaching over 100,000 people annually. Our unique ability to raise funds, coupled with our community outreach services enables us to provide leadership and resources essential to create lasting change in community conditions and improve the lives of residents in need.

UWCC identifies community challenges and brings together collaborative efforts to drive solutions that can significantly impact poverty for generations to come. This can be accomplished with a focused community effort to provide access to high quality education that continues to provide working adults with valuable skills to earn more, pay down debt, develop assets and save for their future. UWCC closely monitors 211 Chester County Coordinated Entry calls for health and human services assistance for everyday needs and in crisis situations, to determine highest need areas and programs on a continual basis. Often engaged when other community issues arise, 211 has quickly grown to also support Chester County when faced with disaster or other immediate and developing needs. UWCC is committed to creating meaningful, lasting change for those who need it most in Chester County. Last fiscal year, we invested nearly $3M. in our community through grants to agencies, special initiative funding and donor designations to achieve the following impact:

- 2,662 tax returns were prepared through the Volunteer Income Tax Assistance program (VITA), generating an economic impact of over $5.4 M.
- 246 successful Mobile Home Tax Reassessment appeals were completed, pushing the total reassessments to 756
- 793 individuals received financial coaching, counseling, or other supportive services from our Financial Stability Center
- 17,122 calls were fielded through Chester County Coordinated Entry
- 20 corporate and nonprofit participants graduated from Leadership Chester County and gained valuable business, leadership and entrepreneurial skills

As UWCC transitioned to a new impact agenda centered around recovery, rebuilding and reimagining a stronger Chester County last year, we purchased and renovated a 5,000 square foot stand-alone building, located at 150 John Robert Thomas Drive in the Commons at Lincoln Center Office Park in Exton. This new endeavor serves as the permanent headquarters for our staff as well as host to our new Social Innovation Lab, Leadership Training Center and Financial Independence Hub for our community. This new effort will allow us to invest an additional $1 million back into our community every ten years that otherwise would have gone to rent and occupancy costs.

Funding request

Ongoing economic uncertainty has increased the hardship confronting many of the world's most vulnerable populations, and their needs have grown as a result. Operating within a framework of social innovation can be critical for nonprofits—especially as they face growing pressures to serve more people in need and to deliver measurable results. Social innovations are new social practices that aim to meet social needs in a better way than the existing solutions. These approaches can be applied to their programs, products or devices, partnerships, fundraising, marketing, and operating processes. UW Chester County has recently created the Social Innovation Lab (SIL), designed for the next

generation of social entrepreneurs. The Social Innovation Lab is a collaborative center designed to provide learning and jumpstart innovative and creative approaches to community problems. This space will also include an incubation space for small and start-up non-profits in a co-working environment. SIL will provide nonprofits and other social entrepreneurs with the tools, knowledge, and technical skills to create and implement new ideas that promote social good while creating a space to foster learning, creativity, and collaboration. Through a series of capacity-building programs in partnership with higher education technology teams (i.e., Penn State Nittany AI Alliance) and corporate technology leaders (i.e., Qlik), UWCC will provide nonprofits with the knowledge, tools and collaboration needed to increase their organizations' impact in the community. **T**he Social Innovation Lab will nurture transformative new ways of approaching complex problems to bring about meaningful and sustainable change in Chester County.

Description of key initiatives
The Social Innovation Lab will include the following initiatives:

Capstone Data Project- Penn State Great Valley Master of Data Analytics graduate students are leveraging a myriad of Chester County data sources to craft an insightful "Chester County Dashboard." The dashboard will equip Chester County service providers with intelligence to pinpoint areas of need, discern service request patterns, and uncover valuable insights for targeted interventions. This endeavor will revolutionize how we understand and serve Chester County. Our current access to community data is disjointed and inconsistent. The Chester County Dashboard will be used as a foundation for driving impact in Chester County.

AI for Impact- AI for Impact- powered by Penn State, empowers nonprofits to deliver impact with data-driven and related decision-making tools. Organizations attend training sessions to discover the transformative potential of AI in their sector. Our partnership with Penn State Nittany AI Alliance provides assistance to nonprofits to assist them in understanding AI's potential to elevate their impact by using real-life working examples that target issues that have prevented the participating nonprofits from previously reaching their full potential.

Unlocking Potential: Capacity-Building Workshops- Engaging and practical capacity-building workshops designed exclusively for nonprofit organizations will provide invaluable insights into leveraging cutting-edge tools to elevate their impact. Participants discover innovative ways to amplify their efforts and achieve their missions more effectively through hands-on training with tangible outcomes that will drive immediate results.

Innovate for Impact- provides a learning and collaboration platform that not only ignites curiosity about social innovation but transforms learning into an interactive journey. The engaging format encourages exploration and facilitates idea sharing, obstacle discussions, and one-on-one consultations with skilled experts and mentors.

Specific needs & issues to be addressed
Our United Way recognizes that our success relies on the success of our over 70 nonprofit partners that serve over 100,000 individuals in Chester County in total each year. Our position serving both nonprofit and for-profit sectors has shown us deep disparity in the way society invests in the capabilities, productivity, financial health, and leadership of businesses versus nonprofit organizations. Yet, nonprofits address deeply complex challenges, with limited resources, high turnover, and ever-shifting economic, political, and regulatory pressures. In a recent study funded by Philadelphia Foundation, more than 40% of the 3,200 nonprofits analyzed had a zero or negative operating margin over the past three years and one in five had less than a month of cash reserves on hand. To address nonprofit capacity building challenges, UWCC's Social Innovation Lab will be used to leverage technology and innovation to lead nonprofit capacity building in Chester County.

Social Innovation enables us to solve problems, create new opportunities, and improve our quality of life. Innovation and social impact are closely intertwined. Innovation can be a powerful tool for addressing social challenges, and social impact can provide the motivation and inspiration for innovative thinking. The Social Innovation Lab will nurture transformative new ways of approaching complex problems to bring about meaningful and sustainable change in Chester County.

Why it is important to fund this now

Since its inception, UWCC has been working to highlight the needs of its low- and moderate-income residents in Chester County. In 2020, along with United Way of Pennsylvania, UWCC released the most recent ALICE report which highlighted the struggles low- and moderate-income families in Chester County face. The ALICE Report for Pennsylvania describes the population called ALICE, an acronym for Asset Limited, Income Constrained, Employed -families with income above the Federal Poverty Level, but not high enough to afford basic household necessities. With the cost of living exceeding what most people earn, ALICE households live in every county in Pennsylvania, and they include women and men, young and old, of all races and ethnicities. There is currently a 30% rate of ALICE households in Chester County that live at or well below the ALICE threshold and are most at risk of financial backslide, which includes 4% that are also living below the poverty line.

Most recent national trends are pointing to a soaring poverty rate for 2022 as well, as pandemic-related aid ended, and prices rose. As reported in the NY Times, September 12, 2023, "Poverty increased sharply last year in the United States, particularly among children, as living costs rose and federal programs that provided aid to families during the pandemic were allowed to expire." The Census Bureau reported that the poverty rate rose to 12.4 percent in 2022 from 7.8 percent in 2021, the largest one-year jump on record, and the share of children in poverty more than doubled. As many families in Chester County will also experience a poverty increase in 2023, nonprofits must be more efficiently aligned with new technology and innovation to meet the expected increase in demand for their services in 2024.

How impact & results will be demonstrated

We will track survey feedback from participants following each session, and/or project, to determine how they will employ AI and other solutions they have learned. There will be a 6-month and 12-month follow-up with the participants to more fully understand and document the efficiencies gained through their newly employed innovative solutions. The multi-purpose community space will be available to our partners for booking as needed in addition to providing a headquarters and meeting and collaboration space for our Social Innovation Lab, so we will be able to track the use of the collaboration space as well.