

United Way of Northeast Florida

# Notice of Funding Opportunity Priority Goals

United Way  
of Northeast Florida



This Notice of Funding Opportunity (NOFO) is for social-service nonprofits interested in partnering with United Way to provide solutions in youth success, financial stability and health on behalf of Northeast Florida citizens.

**Key Dates:**

- Letter of intent due: Jan. 10, 2018
- Invitation to apply for funds: Feb. 9, 2018
- Full application due: March 16, 2018

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## United Way of Northeast Florida Community Impact Executive Summary

We have a lot to be proud of in our community. Our nonprofit and corporate sectors seek every opportunity to collaborate and develop new ways to improve Northeast Florida. Community leaders step up as the voice of change and advocate for progress. Individuals transform our neighborhoods through thousands of community service projects annually. But in terms of opportunities for people to move up the income ladder, much improvement is needed.

The factors that prevent children and families from experiencing safe, stable and successful lives are complex and must be addressed holistically and collectively.

In order to drive change in Northeast Florida, United Way works with partners to develop integrated solutions focusing on what works and what is most needed. By investing more than \$16 million each year in organizations that change lives, United Way helps solve Northeast Florida's toughest challenges.

On the following pages is a breakdown of these investments. Across the national United Way network, a traditional role is to distribute funds via a strategic investment process; a majority of United Way of Northeast Florida's investments in the community still use this model.

**United Way provides funding in the following areas:**

## Youth Success

Too many of our children and youth face challenges that set them back for life: poor preparation for school, stressful home environments and overwhelmed parents, to name a few. United Way strategies give these children a second chance through a continuum of services to address these challenges.

## Financial Stability

Increasing income, building savings, and gaining and sustaining assets are the basics to building a better future. United Way and its partners offer a range of services to help families move toward financial security and, ultimately, upward economic mobility.

United Way is a lead partner in the Network For Southern Economic Mobility. This MDC-founded support network of four Southern cities is designed to deepen, accelerate and align strategic investments for systemic change in eliminating barriers to economic success for youth.

## Health

Health is a basic need that affects every aspect of a person's daily life. Good mental and physical health allows children to learn better and adults be independent and productive citizens.

## Basic Needs

United Way funds programs that provide services to vulnerable citizens. Areas include but are not limited to: temporary food assistance, emergency shelter, utility

assistance, emergency financial assistance, clothing and disaster response services; legal assistance; emotional support to individuals in a unique situation such as a medical crisis or domestic violence; health screenings; assistance for persons with disabilities and/or developmental delays; and senior programs promoting independence and healthy lifestyles.

## Information and Referral

### • United Way 2-1-1

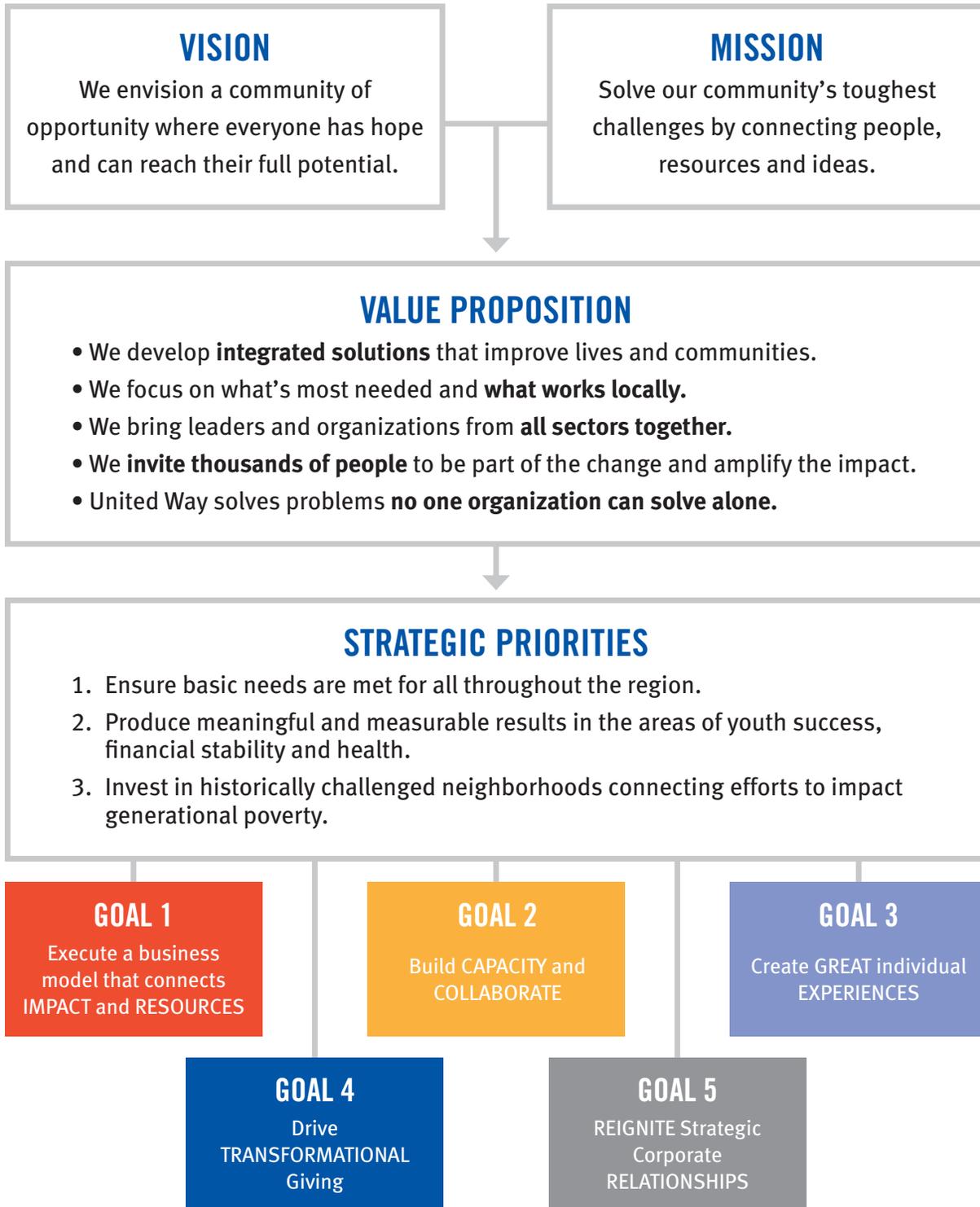
Persons living in a nine-county region of Northeast Florida can dial 2-1-1, an easy-to-remember, three-digit telephone number. United Way 2-1-1 connects callers to free information and referrals to health, social and human services. Counties covered are Duval, St. Johns, Clay, Baker, Nassau, Columbia, Suwannee, Hamilton and Putnam. United Way 2-1-1 partners include United Way of Northeast Florida, United Way of St. Johns County, United Way of Suwannee Valley and the City of Jacksonville.

### • Help Me Grow

Help Me Grow is a resource for parents and caregivers of children birth through age 8. The resource is designed to connect families to information about child development and community resources. It helps close the gap between the needs and available services for families by providing developmental screenings, referrals and care-coordination services. Any parent or community partner is welcome to dial 2-1-1 and ask for Help Me Grow. 2-1-1 staff answer questions about a child's development, behavior, health and learning.

# United Way's Strategic Framework

The chart below provides a framework for United Way's overall strategic plan. The information gives a high level overview of United Way's values, goals and focus areas.



# United Way's Priority Goals Strategy

United Way has refined a framework to best make a difference across Baker, Clay, Duval, Nassau and Northern St. Johns counties. To produce meaningful community change, United Way and partners explored the interconnected nature of our community's toughest challenges: students cannot learn when their home life is stressful; families cannot support their children when working multiple low-wage jobs and still struggling to make ends meet; youth can only persist if they have access to postsecondary education and

career success. United Way will strategically deploy its financial and volunteer resources in order to tackle these interconnected challenges.

In consultation with our community partners, United Way will focus on five goals that address the interconnected, complexity of daily life for our children, youth and families. Along with our partners, United Way will align work and resources for the following goals and related community indicators:

Priority Goals		Community Indicators
Goal 1	Young children are thriving and prepared for school success.	<ul style="list-style-type: none"> <li>Percent of students who are proficient on state kindergarten readiness assessment</li> </ul>
Goal 2	Students successfully transition to middle school and high school.	<ul style="list-style-type: none"> <li>Percent of third, fifth and eighth grade students proficient in:                             <ul style="list-style-type: none"> <li>language arts</li> <li>math</li> </ul> </li> </ul>
Goal 3	Students graduate high school prepared for college or career success.	<ul style="list-style-type: none"> <li>High school graduation rate</li> <li>Percent of 16-24 year olds in school or employed</li> </ul>
Goal 4	Families are economically stable and self-sufficient.	<ul style="list-style-type: none"> <li>Percent of individuals/households at or below poverty line</li> <li>Percent of households at or below ALICE threshold (see Attachment B)</li> </ul>
Goal 5	Children, youth and families are physically and mentally well.	<ul style="list-style-type: none"> <li>Percent uninsured</li> <li>Suicide rate</li> <li>Percent at healthy weight</li> <li>Child abuse rate</li> <li>Percent of youth reporting alcohol and/or other drug use</li> </ul>

For each of the goals, United Way and community partners collaboratively established a set of focused strategies and programmatic metrics, which will be used to determine:

- To what extent progress is made on the identified community indicators.
- How the lives of those most vulnerable in our community are impacted.
- How community partners can continue to work better together to improve.

As we work together on these goals and collect key metrics over the next two years, we anticipate we will:

- Better align and leverage our collective services to improve outcomes.
- Find new ways to work together efficiently and effectively.
- Ensure more children and families, especially those from historically disadvantaged neighborhoods, are benefiting from aligned services.

### **Funding Purpose and Structure**

The purpose of this NOFO is to communicate United Way's funding process for our Priority Goals and encourage agencies doing outstanding work aligned to these goals to apply for funding. **Agencies must select at least one Priority Goal.**

### **Funding Priorities and Eligibility**

The tables in the Mandatory Results-Based Accountability Measurements section (page 15) outline the strategies and metrics for each of the five goals. Agencies interested in applying for funds in one or more of the Priority Goals must use this funding proposal to:

- Describe which strategy(ies) their program supports.
- Provide data demonstrating how program clients align to United Way's priority populations identified within each priority goal.
- Provide programs that serve one of the priority populations are eligible for bonus points.
- Identify which metrics their program will report.

### **Successful programs in Priority Goals will:**

- Demonstrate a clear connection to at least one strategy within one priority goal.
- Clearly track client progress and/or services.
- Collaborate with United Way, other programs and other service providers.
- Serve in at least one of the United Way service counties.

## Agency Eligibility

United Way of Northeast Florida is interested in partnering with the most efficient, effective and innovative service providers in Duval, Nassau, Baker, Northern St. Johns and Clay counties. Any organization seeking United Way funding must demonstrate the ability to operate programs in a manner consistent with the highest standards of quality, which shall include compliance with United Way management and financial requirements.

**Programs must be able to demonstrate a minimum of a three year programmatic history.**

**Agencies must make a minimum request of \$25,000.**

**All agencies seeking United Way funding must submit online a Letter of Intent (LOI) on agency letterhead; acknowledgement of Agency Prequalification Checklist; and submit agency financials as outlined in the Prequalification Checklist. A copy of the checklist is included in this packet on pages 10, 11 and 12.**

- The LOI, Agency Prequalification Checklist acknowledgement and financials must be completed and submitted through United Way's website: [unitedwaynefl.org/funding](http://unitedwaynefl.org/funding)
- LOI, Prequalification Checklist acknowledgement and financials are due online **no later than 5 p.m. Friday, Jan. 10, 2018.**

**The LOI must be on agency letterhead and contain (on no more than two pages):**

- A brief agency history.
- Identification of the Priority Goal(s) that the agency has selected to apply under.
- A description of the program(s) for which the agency is seeking funding.
- The amount of funding being requested.

By signing and submitting the LOI, the agency is affirming all information in the Prequalification Checklist and agency financials are true and available for inspection and audit upon written request. **The LOI must be signed by both the agency top executive and its board of directors chair.**

Each agency that submits an LOI and supporting documents to United Way will be reviewed and notified as to their prequalification status. Agencies will be notified by email on or around Feb. 9, 2018.

## Expectations of Agencies

United Way is excited to work with leading organizations in our community to make Northeast Florida stronger.

### **Agencies that receive funding from United Way must agree to the following:**

- Submit a mid-year and end-of-year report. These reports will hold agencies accountable for results as well as allow United Way to better understand, evaluate and communicate progress toward the Priority Goals.
  - a. Mid-Year Report: A mid-year report no later than Jan. 15 of the contract year submitted online via e-CImpact or as directed by United Way.
  - b. End-of-Year Report: An end-of-year report no later than July 15 of the contract year submitted online via e-CImpact or as directed by United Way.
- Advise United Way of any fiscal or programmatic issues arising during the year that are or have the potential of negatively impacting the delivery of the contracted services.
- Comply with all rules and laws that apply to background screening of employees and volunteers involved in direct client contact.
- Hold harmless, indemnify and defend United Way of Northeast Florida, its directors, officers, employees, representatives and agents against any claim, action, loss, damage, injury (including death) or property damage. This includes destruction arising out of or in connection with any negligent act or omission of the provider or any agents, employees or its assigns in providing the services called for in the performance of the work.
- Support the partnership with United Way through the following:
  - a. Comply with the United Way Agency Directors Association's (UWADA) ethics policy to promote fundraising for United Way's mission.
  - b. Place United Way's logo on all agency stationary, pamphlets, signage and website.
  - c. Actively support the United Way mission by participating in an annual United Way fundraising campaign. United Way will provide training, materials and support to conduct an effective campaign.
  - d. Highly consider supporting United Way's campaign by attending Speakers Bureau training and responding to calls for speakers when available.

# Agency Prequalification Checklist: Priority Goals

## Financial Requirements:

- Agency is registered and in good standing as a not-for-profit corporation in the State of Florida.
- If required by Internal Revenue Service (IRS) regulations, agency has filed a Form 990 for the most recent fiscal year.
- The agency is willing to submit required financial statements and documents (listed on pages 10 to 12) for the most recently completed fiscal year as a part of the prequalification process. All financial statements must be prepared on an accrual basis according to the generally accepted accounting principles (GAAP) of the American Institute of Certified Public Accountants (AICPA) for nonprofit organizations.
- Financial scoring will be based on submitted information only. Follow-up requests will not be made for missing or incomplete documents.** If you are unsure of what is being requested, you should contact United Way staff for clarification before submitting.

**Financial statement requirements are based on agency/organization total revenue as follows:**

### Agency revenue of \$500,000 and above must submit:

- Most recent Form 990
- A management letter, if applicable

- Audits conducted by an independent Certified Public Accountant (CPA) according to generally accepted accounting principles (GAAP), which includes an opinion regarding the accuracy of the agency's financial reports
- Sufficient number of audits to cover the three most recent years

### Agency revenue of \$250,000 to \$499,999 must submit:

- Most recent Form 990, if applicable
- An independent financial review: a management inquiry conducted by an independent CPA firm according to generally accepted accounting principles (GAAP) that includes all financial statements
- Sufficient number of financial reviews to cover the three most recent years (organized by year)

### Agency revenue less than \$250,000 must submit:

- Most recent Form 990, if applicable
- Financial statements (i.e. balance sheet, profit and loss statement for the most recently completed year)
- A management certification or compilation
- Sufficient number of financial reviews to cover the three most recent years (organized by year)

**Complete at [unitedwaynefl.org/funding](https://unitedwaynefl.org/funding)**

**Component or unit of an agency:**

- Agencies that are components of other organizations must submit accurate internally generated financials for the past three fiscal or calendar years
- Financial information must be in 12-month increments based on your agency's fiscal or calendar year

**Additional notes on submitted financials:**

Additional supplemental information (optional) that will provide insight to submitted financials:

- If current year audit, review or compilation has not been completed, provide explanation as to why and anticipated completion date
- Any comments that would help support or provide clarity on submitted financial information. Some examples could be:
  - Cause for current year loss (contract ended, implementation of new accounting system, fundraising cost, etc.)
  - Cause for increase in debt
  - Cause for significant changes in accrued liabilities
  - Current plans that are going to be implemented in the coming year(s) such as a capital campaign, new grant/contract, significant contribution

**General agency requirements:**

- The agency is in compliance with the Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism Act of 2001 (USA PATRIOT Act) and other counterterrorism laws.
- The agency has an equal opportunity and affirmative action policy or a policy on diversity for its staff, governing body, committees, volunteers and services delivered.
- The agency provides services to persons residing in at least one county in the Northeast Florida area (Duval, Nassau, Baker, Clay or Northern St. Johns counties).
- The agency has appropriate insurance coverage and can provide certificate of insurance upon request.
- The agency has a clearly stated mission.
- The agency has a permit to solicit funds from the City of Jacksonville's Office of Consumer Affairs and/or the Florida Department of Agriculture and Consumer Services.
- The agency outlines its goals in a written strategic plan or is currently working to complete a strategic plan.
- The agency has written personnel policies approved by its governing body/board of directors, and the policies are available to staff.

**[Complete at unitedwaynefl.org/funding](https://unitedwaynefl.org/funding)**

**General agency requirements (continued):**

- The agency secured certification or accreditation through a local, state or national affiliate where applicable.
- The agency's facilities meet minimum health, fire and safety codes and present no architectural barriers to potential clients (seeks to comply with the Americans with Disabilities Act of 1990).

**Board of directors requirements:**

- The agency's board maintains written bylaws.
- The organization's board has a limited tenure with a rotation plan of board members and elected officers.
- The agency's board meets at least four times a year, operates with a quorum and records minutes of all meetings.
- The agency's board controls the fiscal affairs of the organization, including the development and adoption of an annual budget.
- The agency's board is responsible for the employment and ongoing performance evaluation (at least annually) of the agency's top executive.

**Complete at [unitedwaynefl.org/funding](https://unitedwaynefl.org/funding)**

## General Information for Priority Goals Funding

1. United Way of Northeast Florida will provide a two-year commitment for Priority Goals program funding. The funding agreement is contingent upon the financial success of the United Way annual fundraising campaign as well as continued provider and program performance.
2. United Way Priority Goals funding year is July 1 to June 30. Contracts may be extended at the discretion of United Way.
3. Only programs aligned with one of United Way's Priority Goals strategies will be eligible for Priority Goals funding.
4. United Way has established evaluation teams comprised of United Way community volunteers. They are responsible for completing the funding request review and providing funding recommendations to the appropriate United Way boards and committees. The evaluation team will use the funding criteria and scoring rubric (Attachment A) as its guide for the evaluation process.
5. LOIs are due Jan. 10, 2018, through online submission at [unitedwaynefl.org/funding](http://unitedwaynefl.org/funding). Funding applications (if invited to participate) are due no later than 5 p.m. Friday, March 16, 2018.
6. Any LOI or application submitted after the deadline will be ineligible for funding.
7. All agencies invited to submit a full application must attend a mandatory application workshop to be eligible for United Way funding. Dates and times for mandatory trainings are listed below. Agencies are required to select one of these times and can send multiple staff persons, if desired. An email with registration instructions will be sent to all agencies completing a full application.

### Application Workshops (must attend one session)

#### Location:

United Way of Northeast Florida  
Jessie Ball duPont Center  
40 E. Adams St., Jacksonville, FL 32202

**Goals 1 and 5: Feb. 12 or 14, 2018 • 3-4:30 p.m.**

**Goal 2: Feb. 13 or 16, 2018 • 9-10:30 a.m.**

**Goals 3 and 4: Feb. 13 or 15, 2018 • 3-4:30 p.m.**

By accepting funding from United Way, an agency is agreeing to abide by expectations and obligations as outlined in "Expectations of Community Partner Agencies" on page 9.

## Funding Criteria

United Way provides Priority Goals funding to agencies to support programs that demonstrate the ability to address directly one of the Priority Goals as outlined in this document.

**Award Type and Amount:** Each agency submitting an application for funding will be required to track and report results using the applicable Results Based Accountability (RBA) framework. Applicants should review the RBA framework and identify the primary strategy with which the proposed program aligns.

Awards made under this announcement are subject to the availability of United Way campaign funds each year.

United Way will not provide financial support for more than 25 percent of a program's operational budget.

**Funding decisions will be based on the following criteria:**

1. Alignment with the United Way Priority Goals focus area
2. Community need and program effectiveness
3. Organizational capacity
4. Organization's financial soundness

**Period of Performance:** The period of performance is two years with the possibility of extension at the discretion of United Way (July 1, 2018, to June 30, 2020).

**For a copy of the scoring rubric, see Attachment A.**



## Mandatory Results-Based Accountability (RBA) Measurements

Agencies seeking funding in Priority Goals must measure and provide data using one of the RBA measurement tools below. Agencies must identify which of the five goals they are working on and provide the appropriate measures on their application.

On the following pages, you will find the five Priority Goals and the RBA measures that apply to each. An agency must indicate which strategies they are using and then supply the appropriate “How Much Did We Do,” “How Well Did We Do It,” and “Is Anyone Better Off” on their applications.

**All outcomes marked with a strategy number are mandatory for that strategy.**

**Although there is a single funding pool for Priority Goals, agencies seeking funding must align with at least one of the five Priority Goals listed on page 6. The agency must select the measures from the RBA measurements charts that are appropriate for the type and level of service being provided.**

## Goal 1: Young children are thriving and prepared for school success.

**Outcome:** Families are equipped to support the optimal development of their children.

**Priority Populations:** Families with children ages 0-5 at or below ALICE threshold (see Attachment B)

**Strategies:**

1. Equip families with knowledge and skills to support child development.
2. Ensure families have timely access to and are utilizing quality services.
3. Strengthen home environments to support early child development.

### How much did we do?

- Number of children served (*Strategies 1, 2 and 3*)
- Number of families served (*Strategies 1, 2 and 3*)
- Number of children enrolled for screening (*Strategy 1*)
- Number of family members attending workshops, trainings, etc.
- Number of families receiving information or resources to support early child development
- Number resources distributed to families

### How well did we do it?

- Percentage of children served utilizing needed services (*Strategies 1, 2 and 3*)
- Percentage of children screened (*Strategy 1*)
- Percentage of children identified with developmental delay or disability (*Strategy 1*)
- Percentage of families attending workshops, trainings, etc. who gained new knowledge or skills
- Percentage of families utilizing resources and tools to support early child development (*Strategies 1, 2 and 3*)

### Is anyone better off?

- Number and percentage of families gaining knowledge of early childhood development and parenting strategies (*Strategies 1, 2, and 3*)
- Number and percentage of families reading with their children at least 15 minutes per day (*Strategies 1, 2 and 3*)
- Number and percentage of families utilizing needed community supports (*Strategies 1, 2 and 3*)
- Number and percentage of at-risk children accessing early intervention services

## Goal 2: Students successfully transition to middle school and high school.

**Outcome:** Students and their families have a system of supports that foster educational attainment.

**Priority Populations:** Students in Title I schools, especially in the Ribault or Greater Springfield Full Service School feeder patterns

### Strategies:

1. Connect students with in-school and out-of-school programming to support academic success and overall development (afterschool and summer learning programs, tutoring, homework assistance, mentoring, etc.).
2. Equip families and other supportive peers and adults with tools, knowledge and skills to help young people succeed in school, post-secondary programs and the workforce.
  - Support schools in efforts to implement family engagement activities.
  - Connect families of students with community-based resources (e.g. family counseling, food assistance, transportation, health services).

### How much did we do?

- Number of youth who participate in out-of-school programs and/or individualized supports (*Strategy 1*)
- Number of families receiving tools/new knowledge to support student success (*Strategy 2*)
- Number of program staff trained (*Strategy 2*)
- Number of teachers trained (*Strategy 2*)

### How well did we do it?

- Percentage of students completing program requirements (*Strategy 1*)
- Percentage of program staff who completed training (*Strategy 2*)
- Percentage of teachers who completed training (*Strategy 2*)
- Percentage of families gaining new knowledge/skills (*Strategy 2*)
- Percentage of families gaining access to resources or tools (*Strategy 2*)

### Is anyone better off?

- Number and percentage of students who earn a C or higher grade in core subject areas (*Strategy 1*)
- Number and percentage of students who are promoted on time to next grade level (*Strategy 1*)
- Number and percentage of students served who miss fewer than 10 percent of school days (*Strategy 1*)
- Number and percentage of students with behavior incidents/referred for disciplinary action (*Strategy 1*)
- Number and percentage of high school students obtaining a college-ready ACT/SAT score (*Strategy 2*)
- Number and percentage of families served are connected to and utilize referred services (*Strategy 2*)
- Number and percentage of families that have new tools, knowledge or skills to support their child's success (*Strategy 2*)

## Goal 3: Students graduate high school prepared for college or career success.

**Outcome:** Youth have the education and skills to obtain and retain good jobs with the potential for advancement.

**Priority Populations:**

1. Students in and graduating from Title I schools
2. Students who are: first generation in their family to consider college; low-income; and or at risk of dropping out of a credential/certificate or degree program.

**Strategies:**

1. Provide students with apprenticeships, internships, volunteering, mentoring, etc. to expose them to potential career options.
2. Provide college or credential/certificate prep supports (financial aid counseling, application assistance, ACT preparation).
3. Provide college or credential/certificate entrance and transition supports for incoming students (e.g. registration, financial support, mentoring).
4. Provide supports for students to persist to completion of credential/certificate or degree program.

### How much did we do?

- Number of students served who request help with FAFSA (*Strategy 2*)
- Number of students who enroll in degree or credential/certificate programs (*Strategies 3 and 4*)
- Number of youth who enroll in job-skills training programs (*Strategy 1*)
- Number of students who enroll in apprenticeship/internship programs (*Strategy 1*)
- Number of students placed in jobs that pay living wages (see Attachment B) (*Strategy 4*)

### How well did we do it?

- Percentage of students served who complete FAFSA (*Strategy 2*)
- Percentage of students who complete degree or credential/certificate programs (*Strategies 3 and 4*)
- Percentage of youth who complete job-skills training programs (*Strategy 1*)
- Percentage of students who complete apprenticeship/internship programs (*Strategy 1*)
- Percentage of students placed in jobs for a minimum of 30 days that pay living wages (see Attachment B) (*Strategy 4*)

### Is anyone better off?

1. Number and percentage who complete two- or four-year degrees; certificate programs; job skills and/or entrepreneurship training; internships; and apprenticeships (*Strategies 1,2, 3 and 4*)
  - Number and percentage who gain jobs (occupation, wage level)
  - Number who retain jobs for 6 months
2. Number and percentage who gain post-secondary employment, further education or credentials

## Goal 4: Families are economically stable and self-sufficient.

**Outcome:** Youth and families have the knowledge, skills and resources to increase financial stability and economic mobility.

**Priority Populations:**

1. Youth ages 16 to 24 at or below ALICE threshold (see Attachment B)
2. Families at or below ALICE threshold (see Attachment B)

**Strategies:**

1. Increase the financial-management knowledge and skills of families and youth.
2. Increase the awareness of and enrollment in available benefits (e.g. SNAP) and income supports to improve financial stability.
3. Provide career training and placement resources.

### How much did we do?

- Number screened for benefits/income resources/wage supplements (*Strategies 1, 2 and 3*)
- Number of families/households that receive financial education or coaching (*Strategies 1, 2 and 3*)
- Number of tax returns completed

### How well did we do it?

- Percentage served who enrolled in benefits/income resources/wage supplements (*Strategies 1, 2 and 3*)
- Percentage served who complete financial education or coaching (*Strategies 1, 2 and 3*)
- Percentage of households receiving tax refunds

### Is anyone better off?

1. Number and percentage who substantially increase benefits/income, reduce costs or improve access to resources (*Strategies 1, 2 and 3*)
  - Number who gain substantial benefits/income supplements
  - Number who substantially reduce costs (fees, interest rates or transaction costs)
  - Number who leverage financial products (e.g., open a bank account)

## Goal 5: Children, youth and families are physically and mentally well.

**Outcome:** Children, youth and families increase healthy behaviors and improve their health status.

**Priority Populations:**

1. Children ages birth to five whose families are at or below ALICE threshold (see Attachment B)
2. Students in Title I schools, especially in the Ribault or Greater Springfield Full Service School feeder patterns
3. Families at or below ALICE threshold (see Attachment B)

**Strategies:**

1. Provide access to health care, including affordable insurance.
2. Provide resources that promote good physical and mental health.
3. Increase knowledge and skills of youth to refrain from risky behaviors and increase developmental assets and healthy behaviors.
4. Increase knowledge of, access to and consumption of healthy foods.

### How much did we do?

- Number of people served (*Strategies 1, 2 and 3*)
- Number of agencies, staff and/or youth trained on healthy behaviors (*Strategies 1, 2 and 3*)
- Number of outreach activities conducted (*Strategies 1, 2 and 3*)

### How well did we do it?

- Percentage served who completed program (*Strategies 1, 2 and 3*)
- Percentage who complete training on healthy behaviors (*Strategies 1, 2 and 3*)
- Percentage who gained new knowledge/skills (*Strategies 1, 2 and 3*)
- Percentage who gained access to resources or tools (*Strategies 1, 2 and 3*)

### Is anyone better off?

- Number and percentage of individuals utilizing affordable health care services (*Strategies 1, 2 and 3*)
- Number and percentage of clients acquiring affordable insurance
- Number and percentage of clients increasing physical activity
- Number and percentage of individuals adopting healthy behaviors and avoiding risky behaviors (*Strategies 1, 2 and 3*)
- Number and percentage of days in the community (not in jail, emergency room, hospital, state custody, etc.)

## Priority Goals Funding Timeline

<p><b>November – December 2017</b></p>	<p>Notice Of Funding Opportunity (NOFO) released</p>
<p><b>Jan. 10, 2018</b></p>	<p>Letter of intent due</p>
<p><b>February 2018</b></p>	<ul style="list-style-type: none"> <li>• Invitations are extended to apply for funds (Feb. 9)</li> <li>• Mandatory application workshops and technical assistance (Feb. 12 – 15)</li> <li>• Online funding application opens Feb. 12</li> </ul>
<p><b>March 2018</b></p>	<ul style="list-style-type: none"> <li>• Evaluation team trainings (March 6 – 13)</li> <li>• Applications due by electronic submission by 5 p.m., March 16</li> </ul>
<p><b>April 2018</b></p>	<p>Funding awards announced</p>
<p><b>July 1, 2018</b></p>	<p>Funding cycle begins</p>

## Frequently Asked Questions

### What are the funding areas available through United Way of Northeast Florida?

United Way is focusing on three areas of funding that will roll out over the next three to four years.

**Basic Needs** focuses on safety net programs; **Priority Goals** will focus on specific strategies in the areas of youth success, financial stability and health.

**Priority Neighborhoods** is currently in development and will be geographically specific funding. There will be specific Notice of Funding Opportunity (NOFO) announcements and applications for each area.

### When the funding process is opened to all community agencies, won't there be less money available?

United Way has not set a specific funding pool or funding percentage for its three strategic priorities at this time. There will be several determinants for setting the funding pools such as the current United Way fundraising campaign and the number of agencies seeking funding in each strategic priority area.

### Will United Way be seeking large grant awards in order to fund some of its Community Impact work?

Yes, it is our hope that, in partnership with our funded agencies, we can tell a compelling story and attract larger national funders as well as compete for Federal opportunities.

### My agency is applying for funding in Priority Goals. Can we also apply in another area?

Yes. Agencies can change their currently funded program(s) and seek funding in the areas they feel are a good fit. Those agencies that apply for services under **Priority Goals** can also seek funding in the **Priority Neighborhoods** area once that strategy is finalized. **Basic Needs** funding has closed and will reopen in July 2019.

### Can our agency seek funding for multiple programs?

Yes. While not encouraged due to nonprofit limited resources, you can seek funding under Priority Goals that best fits your organization. Agencies must have provided the Priority Goal(s) strategy for a minimum of three years and have an established track record in that work.

### How should my agency decide which goal to apply under?

Agencies should select the goal(s) in which they believe they can drive results. United Way encourages interested agencies to contact Community Impact staff if they have questions.

### **My agency is a new 501(c)(3). Can we apply for United Way funding?**

Agencies must demonstrate at least a three-year history of providing the service for which they seek funding.

### **Can our agency set its own outcome measures?**

No. Outcome measures are predefined for each area (**Basic Needs, Priority Goals, Priority Neighborhoods**), which allows United Way and its partners to aggregate data. We encourage all agencies to carefully read over the Results Based Accountability (RBA) framework to ensure their program fits within the correct funding area.

### **Can the predefined data/reporting requirements be modified to better fit our program?**

No. Programs must report on the predefined data sets as outlined in the NOFO.

### **Will our program have to collect, track and report on client-level outcomes?**

Yes. Your agency is required to maintain a client management system for tracking and assessing client-level outcomes based on your program's services.

### **What if my program cannot deliver an entire strategy but can deliver a strategy component?**

United Way encourages any agency whose program is not comprehensive enough to deliver an entire strategy to collaborate/partner with another agency in the application process to implement the strategy. A formal memorandum of agreement between the two organizations will constitute evidence of the partnership.

### **How will agencies be notified of successful prequalification?**

The top executive or organization's application lead will be contacted by email.

### **How many times per year will the agency be required to report to United Way?**

Twice. There will be a mid-year report and an end-of-year report.

### **Will our agency have to apply for funding every year?**

Funding contracts cover two years from the start date of the agreement. United Way volunteers will review outcomes and finances annually. United Way reserves the right to extend contracts for additional years. The actual amount and timing of payments is dependent upon:

- Program compliance and outcomes
- Success of annual United Way fundraising campaigns

## Will United Way continue to allow donors to designate their pledges to specific agencies?

Although United Way encourages unrestricted donations to support United Way's broad community goals, designations are still allowed to health and human-services organizations.

## What research has gone into United Way's decision to change its funding process and philosophy?

United Way sought best practices from United Way organizations across the country. These learnings have shown this model to be a highly effective, results-driven funding strategy.

## Who should I contact for assistance with e-CImpact to set up an agency password?

There will be mandatory e-CImpact workshops for all agencies seeking funding. Once completed, your agency will receive its password. For assistance, contact Lorna West at [lornaw@uwnefl.org](mailto:lornaw@uwnefl.org) or 904-390-3261.

**Additional data resources can be found at [unitedwaynefl.org/funding](http://unitedwaynefl.org/funding)**

## STAFF CONTACTS BY TOPIC

### Prequalification Documentation and Budget Guidelines

#### Health (Goals 1 and 5)

**Keto Porter**, Director, Full Service Schools  
[ketop@uwnefl.org](mailto:ketop@uwnefl.org) | 904-390-3247

#### Youth Success (Goal 2)

**Charis Scurry**, Manager, Education Strategies  
[chariss@uwnefl.org](mailto:chariss@uwnefl.org) | 904-390-4004

#### Financial Stability (Goals 3 and 4)

**Carter Elliott**, Director, Financial Stability  
[cartere@uwnefl.org](mailto:cartere@uwnefl.org) | 904-390-3237

### e-CImpact Assistance

**Lorna West**, Administrative Assistant,  
Community Impact  
[lornaw@uwnefl.org](mailto:lornaw@uwnefl.org) | 904-390-3261

**Jan Morse**, Director, Childhood and Youth Strategies  
[janm@uwnefl.org](mailto:janm@uwnefl.org) | 904-390-3267





**United Way  
of Northeast Florida**

## Attachment A – Scoring Sheet for Priority Goals Applications

### General Scoring Guide – Section 1

0-1 point	2-3 points	4-5 points
Agency provides a substantially incomplete response. Does the response provide evidence that the agency is of significant value to the community? Is there weak or missing information?	Agency has provided a reasonably complete response but there is not much evidence provided that the agency provides a significant service to the community.	Agency has provided thorough answers with detail. There is a clear description of their work and they make the case that they provide significant service to the community.

Section One: Agency History (25 points maximum)	Up to 5 points per item
Agency described a history of providing services as identified in the Priority Goal description.	
Agency identified significant milestones and accomplishments.	
Mission and vision statements support the agency’s work in the identified Priority Goal.	
The agency indicates it has a strategic and/or operational plan. The plan supports its work in the identified Priority Goal.	
The agency demonstrates a stable and effective management structure through its organizational oversight and governance structure.	
<b>Subtotal for Section One</b>	

## Attachment A – Scoring Sheet for Priority Goals Applications

### General Scoring Guide – Section 2

0-1 point	2-3 points	4-5 points
Agency provides a substantially incomplete response, or the provided response indicates a low probability that the agency can successfully implement the proposed program. Weak or missing information on population to be served. Does not cite any sources of reputable data.	Agency has provided a reasonably complete response but the probability of the agencies' success is uncertain. Some detail on the target population is provided. Cites some data from at least one source.	Agency has provided thorough answers with detail and provides a high probability of success in providing the services being outlined. Agency appears to have a clear understanding of the population they serve and cites multiple sources of relevant data.

Section Two: Program Information (60 points maximum)	Up to 5 points per item
Identified program aligns with at least one of the Priority Goals as outlined in the NOFO	
Demonstrates the ability and experience to directly benefit the local community by addressing an identified community need and priority population.	
Demonstrates the agency has the ability to have program client recordkeeping for the purposes of planning, reporting and evaluation.	
Clearly describes and thoroughly documents community conditions using appropriate data.	
Leverages existing community resources and volunteers as appropriate.	
Program services are outlined and the program is designed to meet needs identified in the community.	

**Continued on next page**

## Attachment A – Scoring Sheet for Priority Goals Applications

### General Scoring Guide – Section 2 (continued)

0-1 point	2-3 points	4-5 points
Agency provides a substantially incomplete response, or the provided response indicates a low probability that the agency can successfully implement the proposed program. Weak or missing information on population to be served. Does not cite any sources of reputable data.	Agency has provided a reasonably complete response but the probability of the agencies' success is uncertain. Some detail on the target population is provided. Cites some data from at least one source.	Agency has provided thorough answers with detail and provides a high probability of success in providing the services being outlined. Agency appears to have a clear understanding of the population they serve and cites multiple sources of relevant data.

Section Two: Program Information (continued)	Up to 5 points per item
Program staff appear knowledgeable and skilled in delivering the identified program	
Reflects the diversity of the community in its volunteers, clients and staff.	
Engages in collaborative activities in which multiple organizations or groups identify a common mission and work together to achieve that mission through shared resources and shared accountability.	
Integrates its goals and services with other community organizations and groups to address critical community needs.	
Is able to document formal collaborations (such as Memoranda of Agreement) with collaborative partners and identifies involvement or role each partner has in the proposed program.	
Is creative, innovative and/or employs documented, evidence-based best practices.	
<b>Bonus points.: Serves priority population.</b>	
<b>Subtotal for Section Two</b>	

## Attachment A – Scoring Sheet for Priority Goals Applications

### General Scoring Guide – Section 3

0-1 point	2-3 points	4-5 points
Agency provides a substantially incomplete response or the provided response indicates a low probability that the agency can successfully implement the proposed program. Weak or missing information.	Agency has provided a reasonably complete response but the probability of the agencies' success is uncertain. Some detail.	Agency has provided thorough answers with detail and provides a high probability of success in providing the services being outlined.

Section Three: Agency/Program Finances and Agency Capacity (25 points maximum) <small>Completed by Volunteer Accounting Committee</small>	Up to 5 points per item
Demonstrates the agency's capacity to operate a Priority Goals program. Demonstrates financial and budgeting standards.	
Demonstrates diversified funding streams and a plan for program sustainability.	
Sufficient financial oversight and internal controls.	
Clear and understandable accounting system that meets current accounting industry standards as well as accounting procedures, budgets and financial audits that meet acceptable criteria.	
Agency carries adequate insurance to cover liability.	
<b>Subtotal for Section Three</b>	

## Attachment A – Scoring Sheet for Priority Goals Applications

### General Scoring Guide – Section 4

0-1 point	2-3 points	4-5 points
Agency provides a substantially incomplete response, or the provided response indicates a low probability that the agency can successfully implement the proposed program. Weak or missing information on population to be served. Does not cite any sources of reputable data.	Agency has provided a reasonably complete response but the probability of the agencies' success is uncertain. Some detail on the target population is provided. Cites some data from at least one source.	Agency has provided thorough answers with detail and provides a high probability of success in providing the services being outlined. Agency appears to have a clear understanding of the population that they serve and cites multiple sources of relevant data.

Section Four: Data Measurement (25 points maximum)	Up to 5 points per item
Client-level tracking, data collection, analysis and program evaluation procedures in place or demonstrates procedures will be in place prior to program implementation and funding.	
Shows a commitment to and understanding of the high value United Way places on the capability of programs to measure, report on and achieve standard outcomes as outlined in the NOFO.	
Three-year program history of demonstrating results to stakeholders that address identified community needs and target populations.	
Provides examples of using data and program-evaluation results for self-assessment and program improvement.	
Achievable projections (predefined by the RBA framework) consistent with the program narrative and design.	
<b>Subtotal for Section Four</b>	

# ALICE®

ASSET LIMITED, INCOME CONSTRAINED, EMPLOYED



## FLORIDA

ALABAMA, ALASKA, ARIZONA, ARKANSAS, CALIFORNIA, COLORADO, **CONNECTICUT**, DELAWARE, **FLORIDA**, GEORGIA, HAWAII, **IDAHO**, ILLINOIS, **INDIANA**, **IOWA**, KANSAS, KENTUCKY, **LOUISIANA**, MAINE, **MARYLAND**, MASSACHUSETTS, **MICHIGAN**, MINNESOTA, MISSISSIPPI, MISSOURI, MONTANA, NEBRASKA, NEVADA, NEW HAMPSHIRE, **NEW JERSEY**, NEW MEXICO, **NEW YORK**, NORTH CAROLINA, NORTH DAKOTA, **OHIO**, OKLAHOMA, **OREGON**, PENNSYLVANIA, RHODE ISLAND, SOUTH CAROLINA, SOUTH DAKOTA, TENNESSEE, TEXAS, UTAH, VERMONT, **VIRGINIA**, **WASHINGTON**, WEST VIRGINIA, **WISCONSIN**, WYOMING

2017  
UPDATE



Winter 2017

## STUDY OF FINANCIAL HARDSHIP

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United Way of Florida

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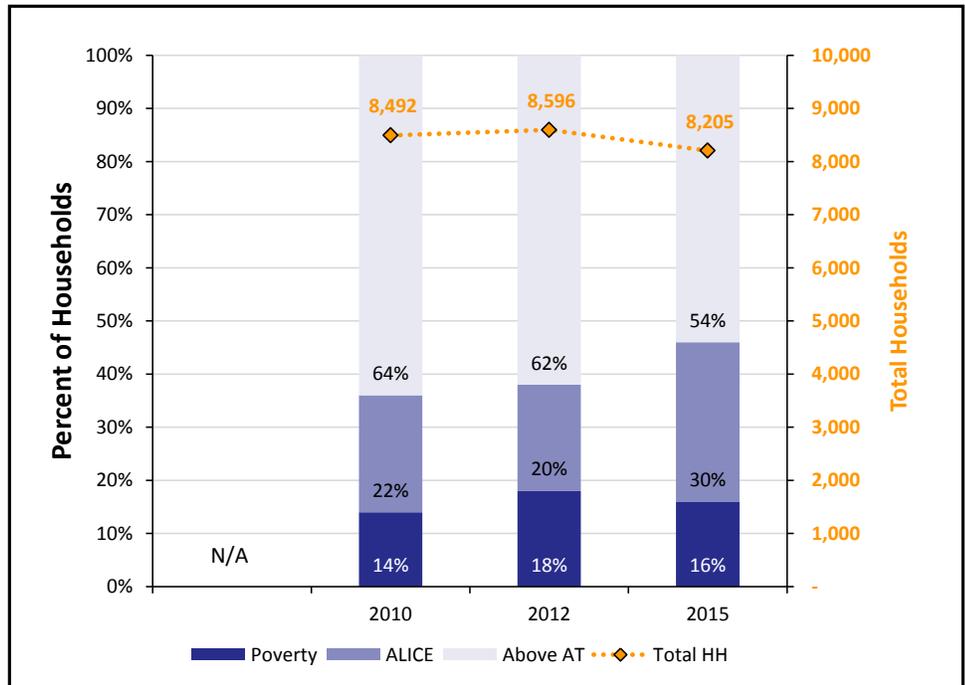
# ALICE IN BAKER COUNTY

**Population:** 27,135 | **Number of Households:** 8,205  
**Median Household Income:** \$47,121 (state average: \$49,426)  
**Florida Underemployment Rate for 2015:** 11.5%  
**Households Below ALICE Threshold:** 3,749 (46%)

## How many households are struggling?

**ALICE** is an acronym for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mloyed – households that earn more than the Federal Poverty Level, but less than the basic cost of living for the county (the ALICE Threshold, or AT). Combined, the number of poverty and ALICE households equals the total population struggling to afford basic needs. The percentage of households below the ALICE Threshold changes over time (left axis, blue bars) as does the total number of households (right axis, dotted yellow line). The Great Recession, from 2007 to 2010, caused hardship for many families. Conditions started to improve in 2010 and 2012 for some, but not for all.

Households by Income, 2007 to 2015



## What does it cost to afford the basic necessities?

The bare-minimum Household Survival Budget does not include any savings, leaving a household vulnerable to unexpected expenses. ALICE households typically earn above the Federal Poverty Level of \$11,770 for a single adult and \$24,250 for a family of four, but less than the Household Survival Budget.

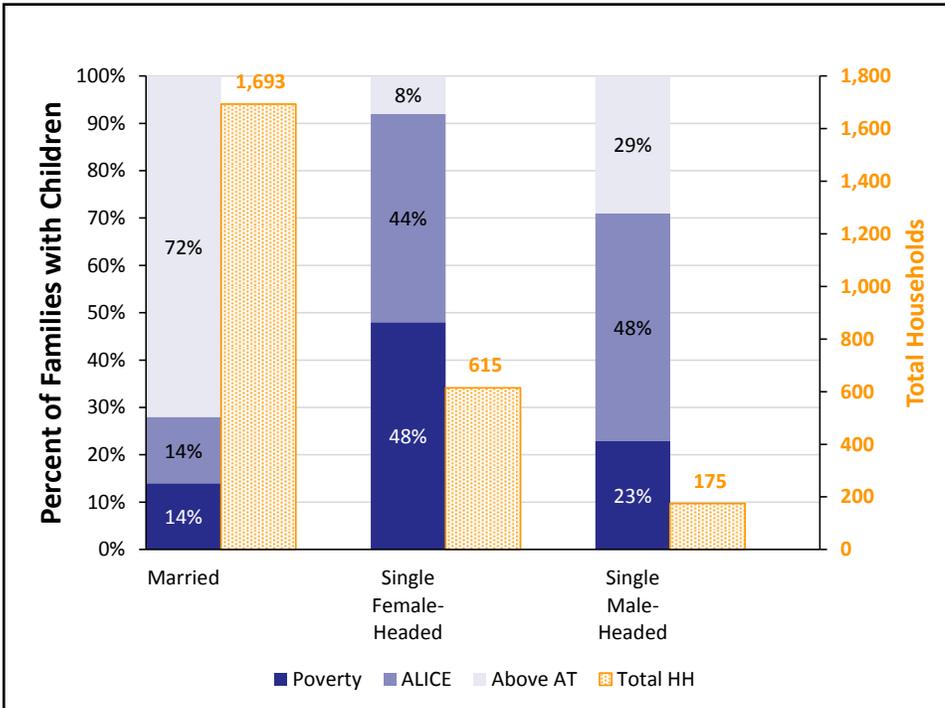
Household Survival Budget, Baker County		
	SINGLE ADULT	2 ADULTS, 1 INFANT, 1 PRESCHOOLER
<b>Monthly Costs</b>		
Housing	\$491	\$728
Child Care	\$-	\$757
Food	\$165	\$547
Transportation	\$322	\$644
Health Care	\$165	\$634
Miscellaneous	\$130	\$347
Taxes	\$160	\$162
<b>Monthly Total</b>	<b>\$1,433</b>	<b>\$3,819</b>
<b>ANNUAL TOTAL</b>	<b>\$17,196</b>	<b>\$45,828</b>
<b>POVERTY ANNUAL TOTAL</b>	<b>\$11,770</b>	<b>\$24,250</b>

Sources: 2015 Point-in-Time Data: American Community Survey. ALICE Demographics: American Community Survey; the ALICE Threshold. Budget: U.S. Department of Housing and Urban Development (HUD); U.S. Department of Agriculture (USDA); Bureau of Labor Statistics (BLS); Internal Revenue Service (IRS); Florida Department of Education, Office of Early Learning.

## How many families with children are struggling?

Children add significant expense to a family budget, so it is not surprising that many families with children live below the ALICE Threshold. Though more Baker County families are headed by married parents, a greater percent of single parent families have income below the AT (left axis, blue bar). Total number of families in each category are reflected by dotted yellow bars (right axis).

### Families with Children by Income, 2015

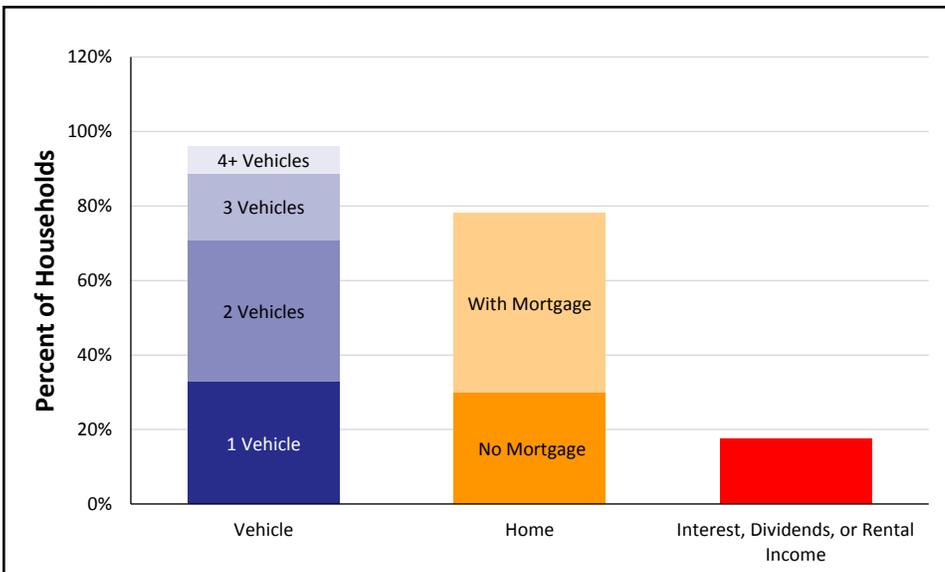


Baker County, 2015		
Town	Total HH	% ALICE & Poverty
Macclenny	1,899	49%
Macclenny CCD	4,493	42%
Sanderson CCD	3,712	50%

## What assets do households have?

Ownership of assets can contribute to stability of households. Yet few families in Baker County own liquid assets, such as a savings account, 401(k) plan, or rental income, that are readily available to cover emergency expenses. Vehicles, the most common asset, depreciate over time. Homeownership, the next most common asset, can build wealth, but is not a liquid asset.

### Assets, All Households, 2015



*Note: Municipal-level data on this page is for Places and County Subdivisions, which include Census Designated Places (CDP), and Census County Divisions (CCD), relatively permanent statistical areas delineated cooperatively by the Census Bureau and state and local government authorities. These are overlapping geographies so totals will not match county-level data. Municipal-level data often relies on 5-year averages and is not available for the smallest towns that do not report income.*

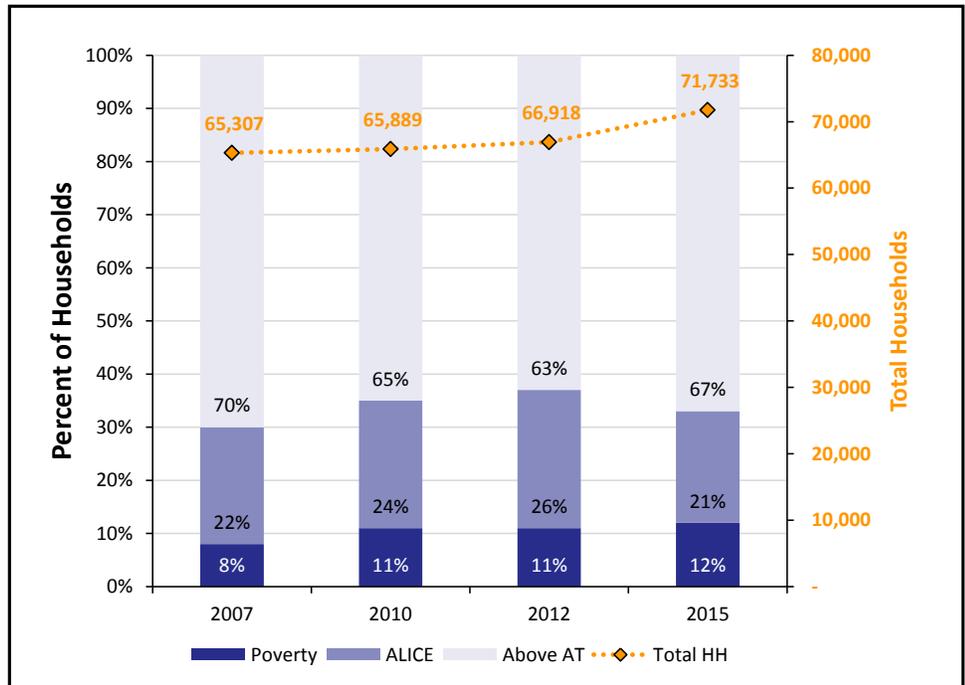
# ALICE IN CLAY COUNTY

**Population:** 203,967 | **Number of Households:** 71,733  
**Median Household Income:** \$58,676 (state average: \$49,426)  
**Florida Underemployment Rate for 2015:** 11.5%  
**Households Below ALICE Threshold:** 23,925 (33%)

## How many households are struggling?

**ALICE** is an acronym for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed – households that earn more than the Federal Poverty Level, but less than the basic cost of living for the county (the ALICE Threshold, or AT). Combined, the number of poverty and ALICE households equals the total population struggling to afford basic needs. The percentage of households below the ALICE Threshold changes over time (left axis, blue bars) as does the total number of households (right axis, dotted yellow line). The Great Recession, from 2007 to 2010, caused hardship for many families. Conditions started to improve in 2010 and 2012 for some, but not for all.

**Households by Income, 2007 to 2015**



## What does it cost to afford the basic necessities?

The bare-minimum Household Survival Budget does not include any savings, leaving a household vulnerable to unexpected expenses. ALICE households typically earn above the Federal Poverty Level of \$11,770 for a single adult and \$24,250 for a family of four, but less than the Household Survival Budget.

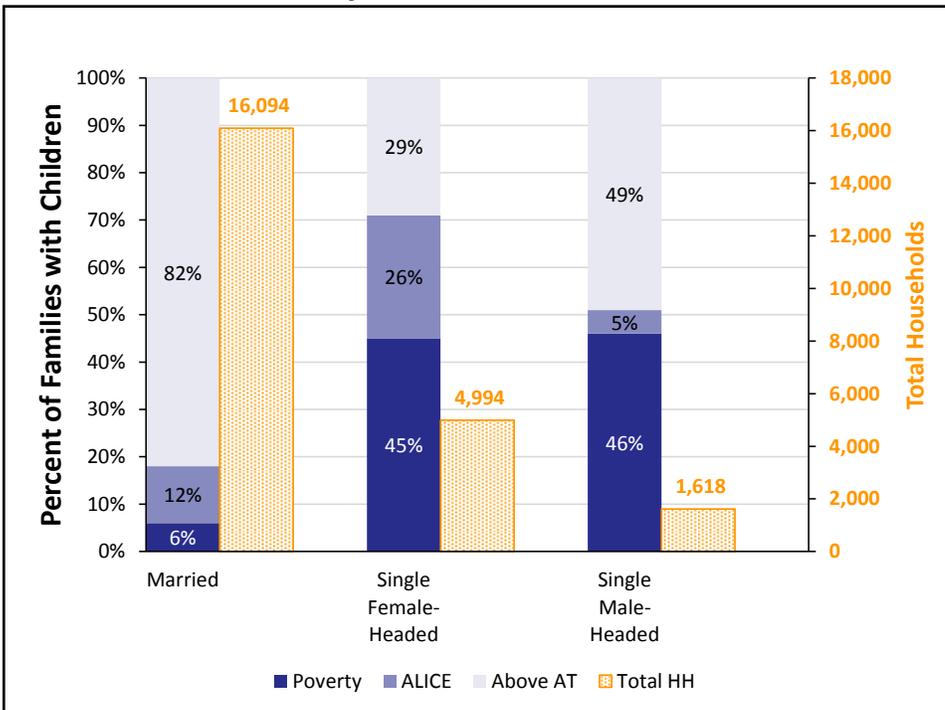
Household Survival Budget, Clay County		
	SINGLE ADULT	2 ADULTS, 1 INFANT, 1 PRESCHOOLER
<b>Monthly Costs</b>		
Housing	\$628	\$931
Child Care	\$-	\$990
Food	\$165	\$547
Transportation	\$322	\$644
Health Care	\$165	\$634
Miscellaneous	\$147	\$403
Taxes	\$191	\$285
<b>Monthly Total</b>	<b>\$1,618</b>	<b>\$4,434</b>
<b>ANNUAL TOTAL</b>	<b>\$19,416</b>	<b>\$53,208</b>
<b>POVERTY ANNUAL TOTAL</b>	<b>\$11,770</b>	<b>\$24,250</b>

Sources: **2015 Point-in-Time Data:** American Community Survey. **ALICE Demographics:** American Community Survey; the ALICE Threshold. **Budget:** U.S. Department of Housing and Urban Development (HUD); U.S. Department of Agriculture (USDA); Bureau of Labor Statistics (BLS); Internal Revenue Service (IRS); Florida Department of Education, Office of Early Learning.

## How many families with children are struggling?

Children add significant expense to a family budget, so it is not surprising that many families with children live below the ALICE Threshold. Though more Clay County families are headed by married parents, a greater percent of single parent families have income below the AT (left axis, blue bar). Total number of families in each category are reflected by dotted yellow bars (right axis).

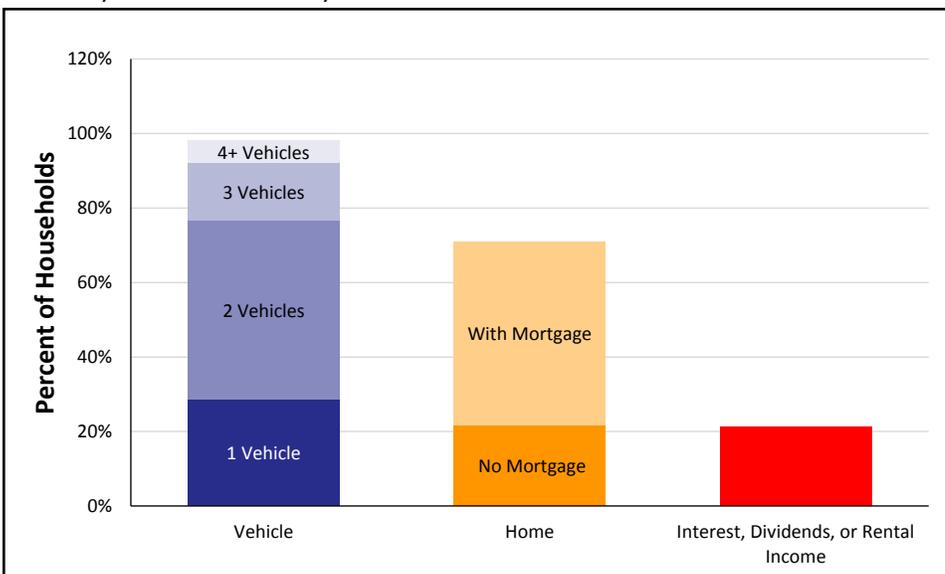
### Families with Children by Income, 2015



## What assets do households have?

Ownership of assets can contribute to stability of households. Yet few families in Clay County own liquid assets, such as a savings account, 401(k) plan, or rental income, that are readily available to cover emergency expenses. Vehicles, the most common asset, depreciate over time. Homeownership, the next most common asset, can build wealth, but is not a liquid asset.

### Assets, All Households, 2015



Clay County, 2015		
Town	Total HH	% ALICE & Poverty
Asbury Lake CDP	2,867	23%
Bellair-Meadowbrook Terrace CDP	5,381	49%
Fleming Island CDP	10,216	19%
Green Cove Springs	2,421	47%
Green Cove Springs CCD	5,128	43%
Keystone Heights	587	34%
Keystone Heights CCD	6,562	45%
Lakeside CDP	11,310	34%
Middleburg CDP	4,438	43%
Middleburg-Clay Hill CCD	18,568	34%
Oakleaf Plantation CDP	6,830	20%
Orange Park	3,455	41%
Orange Park CCD	33,396	31%
Penney Farms	353	53%
Penney Farms CCD	5,399	31%

*Note: Municipal-level data on this page is for Places and County Subdivisions, which include Census Designated Places (CDP), and Census County Divisions (CCD), relatively permanent statistical areas delineated cooperatively by the Census Bureau and state and local government authorities. These are overlapping geographies so totals will not match county-level data. Municipal-level data often relies on 5-year averages and is not available for the smallest towns that do not report income.*

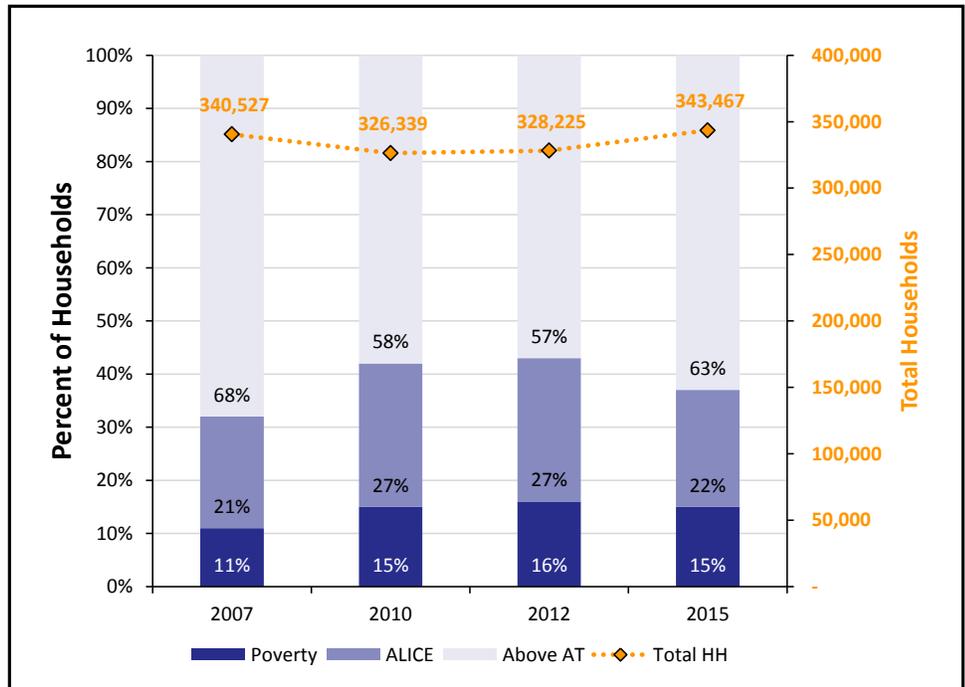
# ALICE IN DUVAL COUNTY

**Population:** 913,010 | **Number of Households:** 343,467  
**Median Household Income:** \$49,554 (state average: \$49,426)  
**Florida Underemployment Rate for 2015:** 11.5%  
**Households Below ALICE Threshold:** 128,665 (37%)

## How many households are struggling?

**ALICE** is an acronym for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed – households that earn more than the Federal Poverty Level, but less than the basic cost of living for the county (the ALICE Threshold, or AT). Combined, the number of poverty and ALICE households equals the total population struggling to afford basic needs. The percentage of households below the ALICE Threshold changes over time (left axis, blue bars) as does the total number of households (right axis, dotted yellow line). The Great Recession, from 2007 to 2010, caused hardship for many families. Conditions started to improve in 2010 and 2012 for some, but not for all.

Households by Income, 2007 to 2015



## What does it cost to afford the basic necessities?

The bare-minimum Household Survival Budget does not include any savings, leaving a household vulnerable to unexpected expenses. ALICE households typically earn above the Federal Poverty Level of \$11,770 for a single adult and \$24,250 for a family of four, but less than the Household Survival Budget.

### Household Survival Budget, Duval County

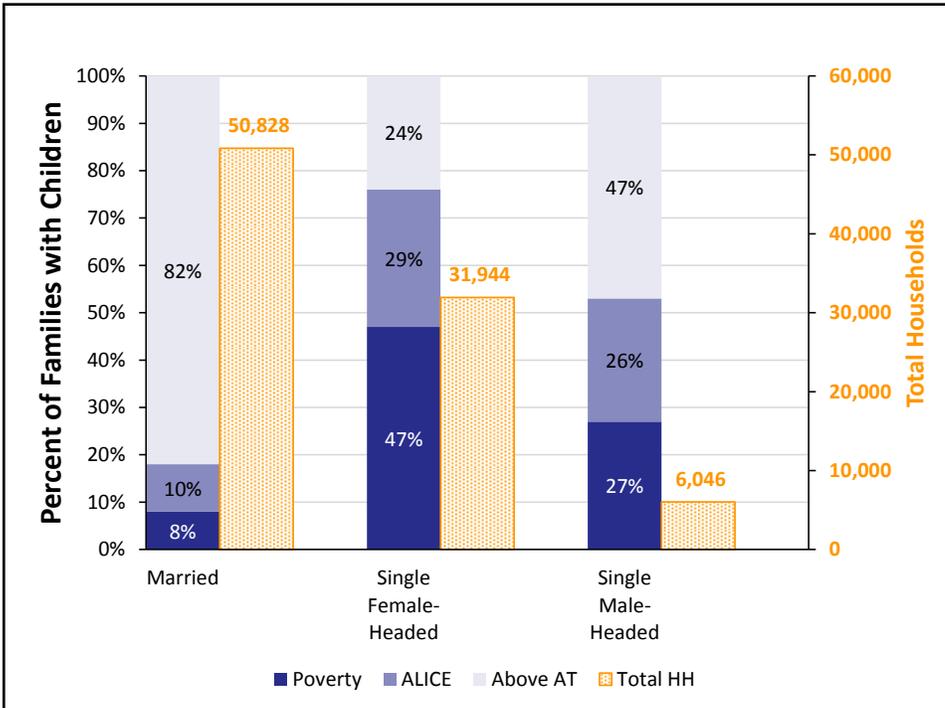
	SINGLE ADULT	2 ADULTS, 1 INFANT, 1 PRESCHOOLER
<b>Monthly Costs</b>		
Housing	\$628	\$931
Child Care	\$-	\$960
Food	\$165	\$547
Transportation	\$322	\$644
Health Care	\$165	\$634
Miscellaneous	\$147	\$399
Taxes	\$191	\$276
<b>Monthly Total</b>	<b>\$1,618</b>	<b>\$4,391</b>
<b>ANNUAL TOTAL</b>	<b>\$19,416</b>	<b>\$52,692</b>
<b>POVERTY ANNUAL TOTAL</b>	<b>\$11,770</b>	<b>\$24,250</b>

Sources: 2015 Point-in-Time Data: American Community Survey. ALICE Demographics: American Community Survey; the ALICE Threshold. Budget: U.S. Department of Housing and Urban Development (HUD); U.S. Department of Agriculture (USDA); Bureau of Labor Statistics (BLS); Internal Revenue Service (IRS); Florida Department of Education, Office of Early Learning.

## How many families with children are struggling?

Children add significant expense to a family budget, so it is not surprising that many families with children live below the ALICE Threshold. Though more Duval County families are headed by married parents, a greater percent of single parent families have income below the AT (left axis, blue bar). Total number of families in each category are reflected by dotted yellow bars (right axis).

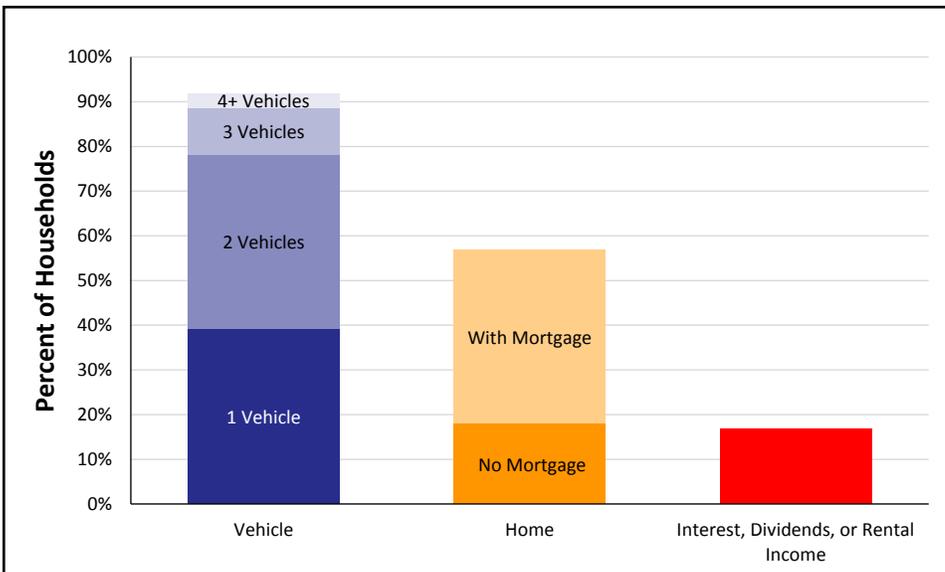
### Families with Children by Income, 2015



## What assets do households have?

Ownership of assets can contribute to stability of households. Yet few families in Duval County own liquid assets, such as a savings account, 401(k) plan, or rental income, that are readily available to cover emergency expenses. Vehicles, the most common asset, depreciate over time. Homeownership, the next most common asset, can build wealth, but is not a liquid asset.

### Assets, All Households, 2015



Duval County, 2015		
Town	Total HH	% ALICE & Poverty
Atlantic Beach	5,477	24%
Baldwin	597	53%
Baldwin CCD	2,340	39%
Jacksonville	323,488	39%
Jacksonville Beach	10,303	27%
Jacksonville Beaches CCD	22,553	30%
Jacksonville East CCD	168,890	35%
Jacksonville North CCD	27,351	36%
Jacksonville West CCD	116,766	49%
Neptune Beach	2,948	22%

*Note: Municipal-level data on this page is for Places and County Subdivisions, which include Census Designated Places (CDP), and Census County Divisions (CCD), relatively permanent statistical areas delineated cooperatively by the Census Bureau and state and local government authorities. These are overlapping geographies so totals will not match county-level data. Municipal-level data often relies on 5-year averages and is not available for the smallest towns that do not report income.*

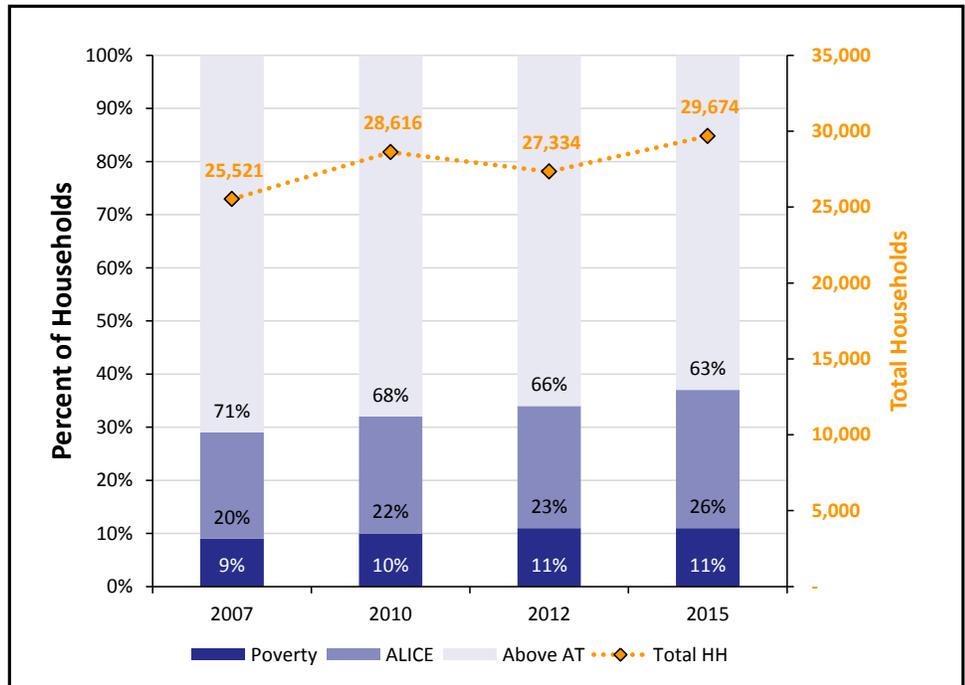
# ALICE IN NASSAU COUNTY

**Population:** 78,444 | **Number of Households:** 29,674  
**Median Household Income:** \$52,005 (state average: \$49,426)  
**Florida Underemployment Rate for 2015:** 11.5%  
**Households Below ALICE Threshold:** 11,156 (37%)

## How many households are struggling?

**ALICE** is an acronym for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed – households that earn more than the Federal Poverty Level, but less than the basic cost of living for the county (the ALICE Threshold, or AT). Combined, the number of poverty and ALICE households equals the total population struggling to afford basic needs. The percentage of households below the ALICE Threshold changes over time (left axis, blue bars) as does the total number of households (right axis, dotted yellow line). The Great Recession, from 2007 to 2010, caused hardship for many families. Conditions started to improve in 2010 and 2012 for some, but not for all.

**Households by Income, 2007 to 2015**



## What does it cost to afford the basic necessities?

The bare-minimum Household Survival Budget does not include any savings, leaving a household vulnerable to unexpected expenses. ALICE households typically earn above the Federal Poverty Level of \$11,770 for a single adult and \$24,250 for a family of four, but less than the Household Survival Budget.

**Household Survival Budget, Nassau County**

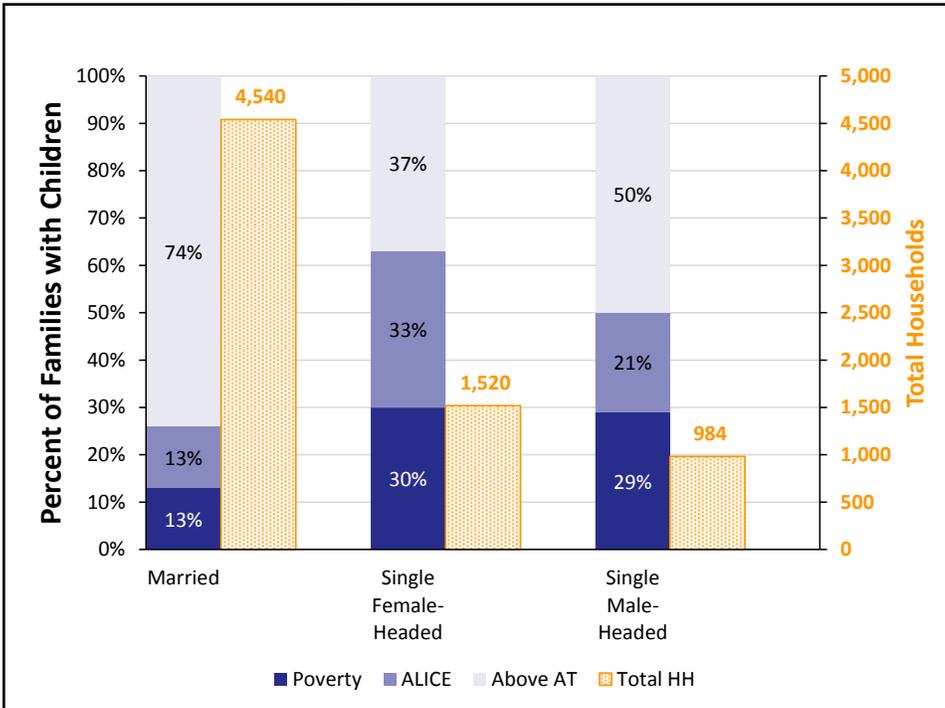
	SINGLE ADULT	2 ADULTS, 1 INFANT, 1 PRESCHOOLER
<b>Monthly Costs</b>		
Housing	\$628	\$931
Child Care	\$-	\$983
Food	\$165	\$547
Transportation	\$322	\$644
Health Care	\$165	\$634
Miscellaneous	\$147	\$402
Taxes	\$191	\$283
<b>Monthly Total</b>	<b>\$1,618</b>	<b>\$4,424</b>
<b>ANNUAL TOTAL</b>	<b>\$19,416</b>	<b>\$53,088</b>
<b>POVERTY ANNUAL TOTAL</b>	<b>\$11,770</b>	<b>\$24,250</b>

Sources: **2015 Point-in-Time Data:** American Community Survey. **ALICE Demographics:** American Community Survey; the ALICE Threshold. **Budget:** U.S. Department of Housing and Urban Development (HUD); U.S. Department of Agriculture (USDA); Bureau of Labor Statistics (BLS); Internal Revenue Service (IRS); Florida Department of Education, Office of Early Learning.

## How many families with children are struggling?

Children add significant expense to a family budget, so it is not surprising that many families with children live below the ALICE Threshold. Though more Nassau County families are headed by married parents, a greater percent of single parent families have income below the AT (left axis, blue bar). Total number of families in each category are reflected by dotted yellow bars (right axis).

### Families with Children by Income, 2015

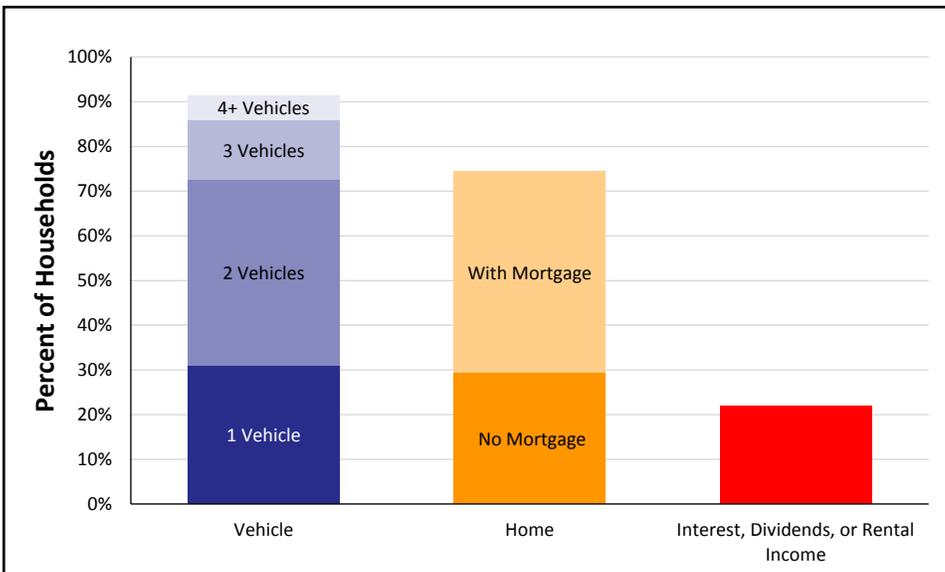


Nassau County, 2015		
Town	Total HH	% ALICE & Poverty
Callahan	540	65%
Callahan-Hilliard CCD	9,178	39%
Fernandina Beach	5,367	33%
Fernandina Beach CCD	9,475	30%
Hilliard	1,047	43%
Nassau Village-Ratliff CDP	1,788	35%
Yulee CCD	9,653	35%
Yulee CDP	4,179	34%

## What assets do households have?

Ownership of assets can contribute to stability of households. Yet few families in Nassau County own liquid assets, such as a savings account, 401(k) plan, or rental income, that are readily available to cover emergency expenses. Vehicles, the most common asset, depreciate over time. Homeownership, the next most common asset, can build wealth, but is not a liquid asset.

### Assets, All Households, 2015



*Note: Municipal-level data on this page is for Places and County Subdivisions, which include Census Designated Places (CDP), and Census County Divisions (CCD), relatively permanent statistical areas delineated cooperatively by the Census Bureau and state and local government authorities. These are overlapping geographies so totals will not match county-level data. Municipal-level data often relies on 5-year averages and is not available for the smallest towns that do not report income.*

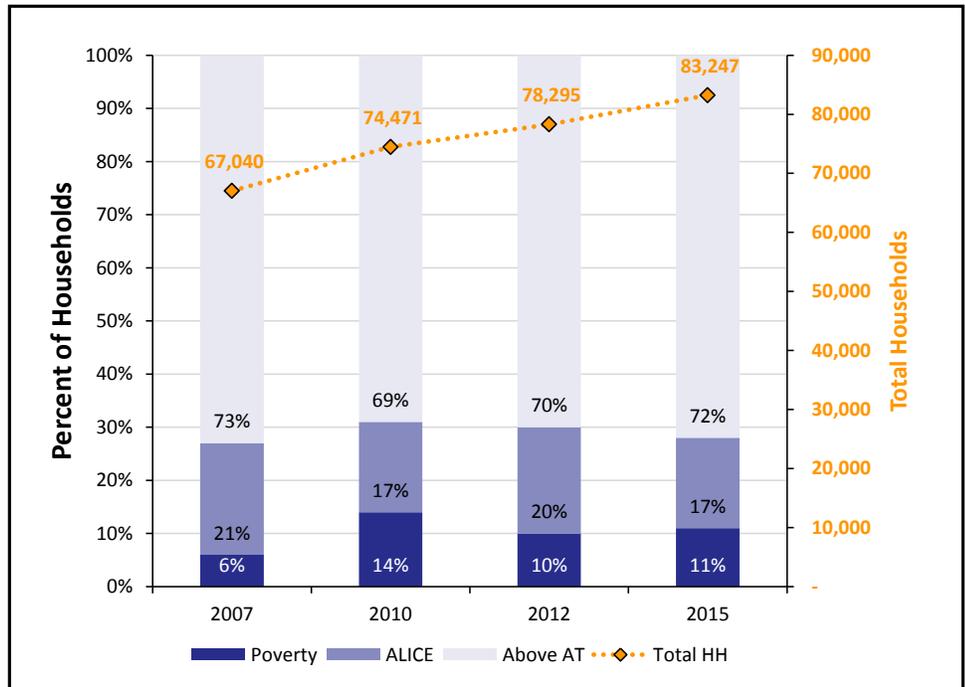
# ALICE IN ST. JOHNS COUNTY

**Population:** 226,640 | **Number of Households:** 83,247  
**Median Household Income:** \$70,379 (state average: \$49,426)  
**Florida Underemployment Rate for 2015:** 11.5%  
**Households Below ALICE Threshold:** 23,812 (28%)

## How many households are struggling?

**ALICE** is an acronym for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed – households that earn more than the Federal Poverty Level, but less than the basic cost of living for the county (the ALICE Threshold, or AT). Combined, the number of poverty and ALICE households equals the total population struggling to afford basic needs. The percentage of households below the ALICE Threshold changes over time (left axis, blue bars) as does the total number of households (right axis, dotted yellow line). The Great Recession, from 2007 to 2010, caused hardship for many families. Conditions started to improve in 2010 and 2012 for some, but not for all.

**Households by Income, 2007 to 2015**



## What does it cost to afford the basic necessities?

The bare-minimum Household Survival Budget does not include any savings, leaving a household vulnerable to unexpected expenses. ALICE households typically earn above the Federal Poverty Level of \$11,770 for a single adult and \$24,250 for a family of four, but less than the Household Survival Budget.

**Household Survival Budget, St. Johns County**

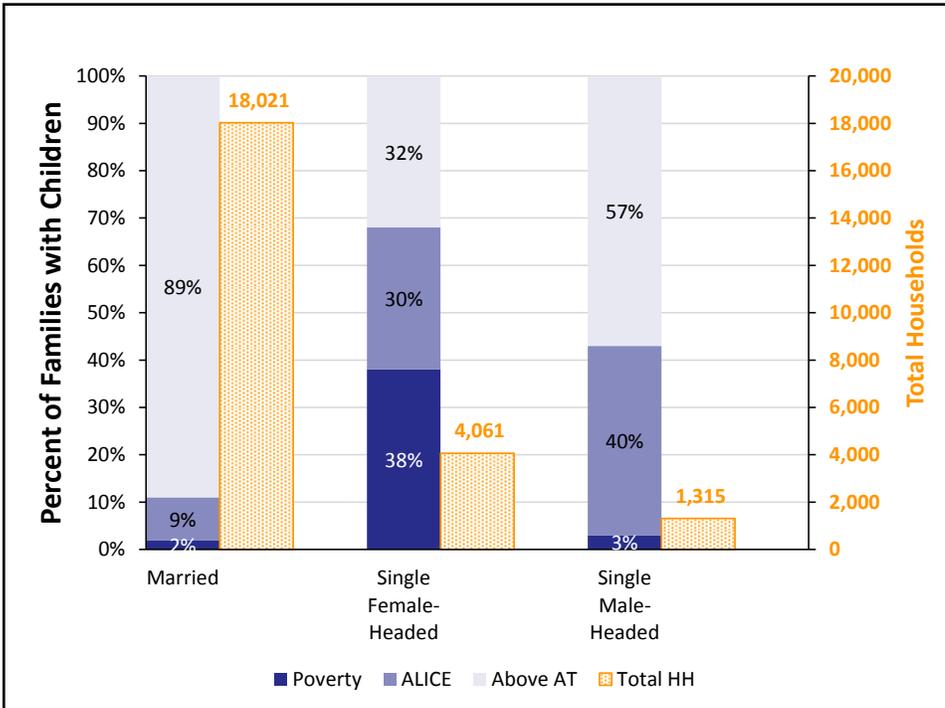
	SINGLE ADULT	2 ADULTS, 1 INFANT, 1 PRESCHOOLER
<b>Monthly Costs</b>		
Housing	\$628	\$931
Child Care	\$-	\$1,052
Food	\$165	\$547
Transportation	\$322	\$644
Health Care	\$165	\$634
Miscellaneous	\$147	\$411
Taxes	\$191	\$304
<b>Monthly Total</b>	<b>\$1,618</b>	<b>\$4,523</b>
<b>ANNUAL TOTAL</b>	<b>\$19,416</b>	<b>\$54,276</b>
<b>POVERTY ANNUAL TOTAL</b>	<b>\$11,770</b>	<b>\$24,250</b>

Sources: **2015 Point-in-Time Data:** American Community Survey. **ALICE Demographics:** American Community Survey; the ALICE Threshold. **Budget:** U.S. Department of Housing and Urban Development (HUD); U.S. Department of Agriculture (USDA); Bureau of Labor Statistics (BLS); Internal Revenue Service (IRS); Florida Department of Education, Office of Early Learning.

## How many families with children are struggling?

Children add significant expense to a family budget, so it is not surprising that many families with children live below the ALICE Threshold. Though more St. Johns County families are headed by married parents, a greater percent of single parent families have income below the AT (left axis, blue bar). Total number of families in each category are reflected by dotted yellow bars (right axis).

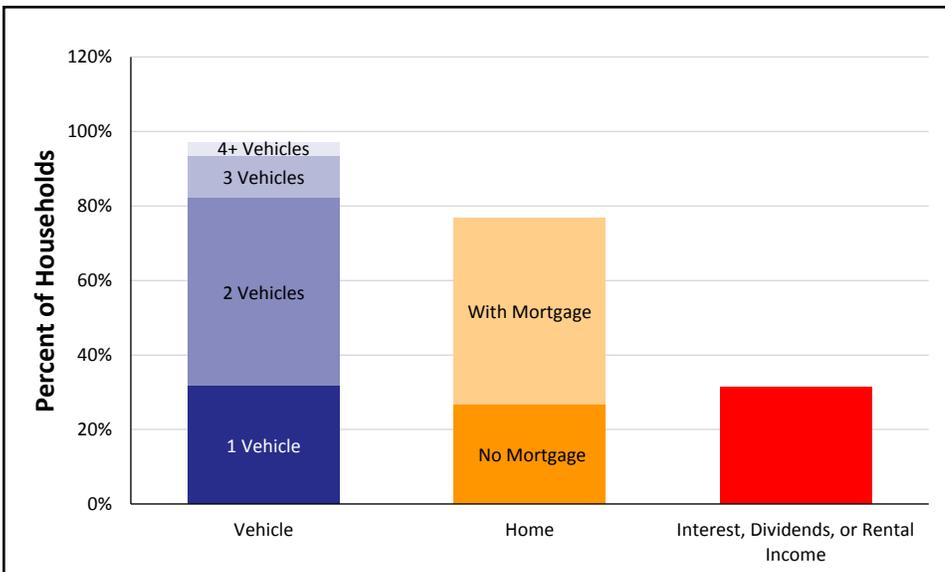
### Families with Children by Income, 2015



## What assets do households have?

Ownership of assets can contribute to stability of households. Yet few families in St. Johns County own liquid assets, such as a savings account, 401(k) plan, or rental income, that are readily available to cover emergency expenses. Vehicles, the most common asset, depreciate over time. Homeownership, the next most common asset, can build wealth, but is not a liquid asset.

### Assets, All Households, 2015



St. Johns County, 2015		
Town	Total HH	% ALICE & Poverty
Butler Beach CDP	2,641	34%
Crescent Beach CDP	487	36%
Flagler Estates CDP	1,015	50%
Fruit Cove CCD	13,609	15%
Fruit Cove CDP	10,066	17%
Hastings CCD	4,452	49%
Matanzas CCD	7,130	41%
Nocatee CDP	2,321	18%
Palm Valley CDP	8,767	26%
Ponte Vedra CCD	12,191	25%
Sawgrass CDP	2,531	27%
St. Augustine	5,477	48%
St. Augustine Beach	2,926	24%
St. Augustine CCD	41,860	34%
St. Augustine Shores CDP	3,721	47%
St. Augustine South CDP	2,144	32%
Villano Beach CDP	1,044	33%
World Golf Village CDP	4,624	17%

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