

United Way of Southwestern Pennsylvania

Multi-Year Grant Application Information Session

Tuesday, March 10, 2026





Workshop Team



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PACE Core Programs

Primary Services

**Leadership
Development**

Intensive Services

Inclusive Voices

Fee-For-Service

Agenda

Introductions

Learning Objectives

UWSWPA Application Process

Application Deep Dive

Break - 10 minutes

Finance Section

Supporting Documents

PACE Technical Assistance “Office Hours”

Q&A

Today

1. Share at the level you're comfortable (this is being recorded)
2. Focus on strengthening clarity and alignment
3. Stronger applications strengthen the entire nonprofit sector
4. Ask sensitive questions during Q&A

Learning Objectives

1 Understand application sections, submission process, and timeline

2 Clearly articulate program activities and timelines

3 Explain program goals, outcomes, and methods to measure success

4 Be able to create a detailed program budget

5 Have a clear understanding of reporting expectations and requirements



UWSWPA Application Process





Timeline

Full Application - Opened March 2, 2026

Technical Information Session with PACE - March 10, 2026

PACE Office Hours: March 10 - April 1, 2026

Application Due Date: April 2, 2026

Awards Announcements: June 2026

Funding (Year 1): July 1, 2026 - June 30, 2027

Application Administration

- Managed through [Grant Lifecycle Manager](#)
- Application questions, contact
community.impact@unitedwayswpa.org
- Online grant system questions, contact
Jacob.Grande@unitedwayswpa.org



Foundant Technologies


Grant Lifecycle Manager (GLM)

- Add Contributors
- Use Question List to Preview
- Use a word processor first (Word, Google Docs, etc)
- Take Note of Character limitations
- LOI answers are carried over into the application*
- Preview Application Packet

Application

PACE Full Proposal Training

Process: 2026 Multi-Year Grants

 Collaborate 0

Contact Info

Request

Documents 0


Applicant:


Jessica Gullickson
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Organization:

Levara LLC 

Contact Email History 

 Eligibility

 LOI

 Application

 Application Packet

 Question List



Application Deep Dive



Scoring Rubric

A grant rubric is the criteria and scoring used by a grants review committee when deciding about a grant.

[Find the full application rubric here](#)



Application: Rubric Structure

Criterion

- Alignment with Investment Priority & Aspirational Goals
- Program Activities & Year 1 Timeline
- Outcomes & Measurement
- Budget, Narrative & Financial Feasibility
- Overall Impression

Scoring

- 1 - Insufficient
- 2 - Needs Improvement
- 3 - Well Defined
- 4 - Clearly Defined
- 5 - Exemplary

Application: Scoring

Scores of 3 represent solid, competitive, and expected responses. 4s and 5s are reserved for exceptional responses.

Criterion scoring based on overall application. Not mapped only to particular questions.

Use plain language and avoid jargon.

No secret answers. Evaluators are looking for clear honest responses.



Criterion: Alignment with Investment Priority & Aspirational Goals

Program(s) show overlap with United Way SWPA's Investment Priorities and Aspirational Goals.

Score of 3

Clear alignment with the assigned Investment Priority and at least one Aspirational Goal. Provides a coherent explanation of how core program elements support these frameworks.

Score of 5

Exceptional and detailed alignment. Clearly demonstrates how multiple solution-based strategies within the priority area and multiple Aspirational Goals are advanced through program design, activities and outcomes.

Alignment is deep, intentional and evident across multiple sections of the proposal.

Criterion: Program Activities and Year 1 Timeline

Timeline provides logical, realistic, and sequenced set of activities. Activities are aligned with the program model, outcomes, and budget.

Score of 3

Provides a clear, coherent set of Year 1 activities with appropriate detail.

Timeline is logical, realistic, and sequenced. Activities are aligned with the program model, outcomes, and budget. Represents a solid and competitive response.

Score of 5

Highly detailed and comprehensive description of Year 1 activities, showing exceptional planning and operational clarity. Timeline is thoroughly developed, fully feasible and optimally sequenced.

Activities demonstrate strong internal consistency across the entire proposal and reflect excellence in program design and implementation.

Criterion: Outcomes and Measurements

Proposal provides defined outcomes and methods for measuring those outcomes.

Score of 3

Outcome 1 (# of people served) is in has a clear and reasonable method for tracking. Outcome logically aligns with the program description, Year 1 activities, and intended impact. Represents a solid, competitive response.

Score of 5

Provides more than one well-designed outcome that is clearly measurable, meaningful and tied directly to program activities.
Demonstrates strong evaluation planning through thoughtful, credible methods.
Shows exceptional alignment to United Way strategies and program goals.

Criterion: Budget, Narrative and Financial Feasibility

Proposal provides a budget and narrative that explains program costs, revenue and planning.

Score of 3

Clear, reasonable budget aligned to activities. Narrative explains major costs and revenue sources.

Demonstrates basic organizational capacity and describes how core programming could be sustained or adjusted if awarded less than requested.

Score of 5

Exceptionally clear, detailed, and transparent budget with strong financial rationale.

Demonstrates sustainability, efficiency, and strong stewardship.

Clear contingency plans and alignment across the proposal.

Provides strong evidence of organizational capacity and a well-developed plan to sustain the program, and maintain impact, even if awarded less than the requested amount.

Criterion: Overall Recommendation

The proposal meets expectations and demonstrates readiness. The evaluator recommends funding.

Score of 3

A solid, competitive proposal that meets expectations and demonstrates readiness. Funding is recommended at a reduced level due to scope, feasibility considerations, budget justification or the degree of clarity and detail provided.

Represents a good program that could achieve impact with partial support.

Score of 5

An exceptional, top-tier proposal demonstrating outstanding alignment, clarity, feasibility and expected impact across all criteria. Represents one of the strongest candidates for full funding and should be prioritized.

Writing for the “5”

Framing responses to be clear, concrete, measurable

Dimension	Mediocre Answer	Terrific Answer	Example Mediocre Phrase	Example Terrific Phrase
Specificity	Vague	Specific	“We support youth in our community.”	“We serve 120 students annually in grades 3–8 from two Title I schools.”
Focus	Output-Focused	Outcome-focused	“We provide tutoring and enrichment.”	“Students receive 10 hours per week of small-group tutoring aligned to classroom instruction.”
Evidence	Opinion based	Data-driven	“Students build confidence and improve.”	“68% of participants improved at least one proficiency level in reading or math.”
Population	General description	Clearly defined target group	“Youth facing barriers to success.”	“42% of enrolled students begin the year below grade-level proficiency.”
Impact	Good intentions	Demonstrated results	“We aim to reduce risk factors.”	“Chronic absenteeism among participants decreased by 22%.”

- (*) asterisk will indicate answers that have
be pulled through from the LOI
- review for accuracy but not revision

Questions





Application Structure

Program

Investment Priority

Program Details

Outcomes

Finance

Supporting Documents



Application: Program

- **Organization Name*** (what your organization goes by) (Character limit 100)
- Are you a **501(c)3** non-profit organization?*

 - Yes, and we have our own EIN/ Tax ID
 - No, but we have a Fiscal Sponsor or Partner Organization

- **EIN or Tax ID Number ***
- **Tell us about your organization *** - 2500 character limit
 - This may include organization history, core programs and services, and other work that may be outside of the specific program you are applying for.



Application: Program

- **County*** - Where your organization is located.
- **Program Name***
- **Investment Priority Area***
 - UW will have assigned this priority based on how your work fits the **Investment Priority Framework**

Application Structure

Program

Investment Priority

Program Details

Outcomes

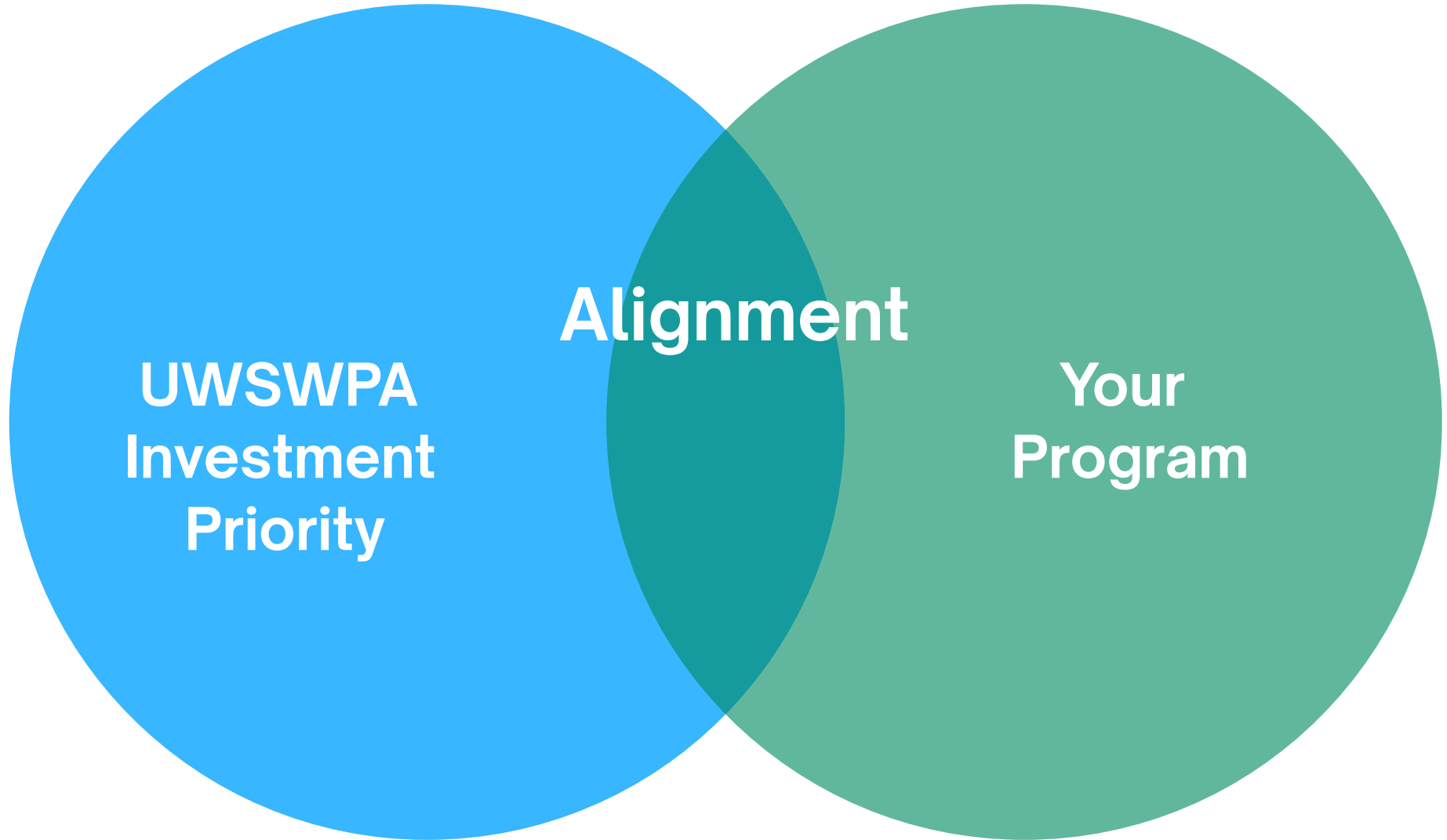
Finance

Supporting Documents

Application: Investment Priorities

How does your program align with the United Way goal of [Selected Investment Priority]? (500 Characters)

Your associated investment priority description will appear for your reference.



United Way SWPA Investment Areas



Meeting Basic Needs



**Moving toward Financial
Stability**



**Building for Success in
School and Life**

Capacity Building

**Reaching greater sector
efficiency and effectiveness**

[For more information about UW's Investment Priorities](#)



Strong Investment Priority Responses

How **specifically** does our program align with United Way's Investment Priority?

Have we **clearly defined** who we serve, including **numbers and data** that demonstrate need?

Have we described our program activities with enough **detail** (frequency, structure, staffing, partnerships)?

Have we included **measurable** results or outcomes that demonstrate impact?

5 Minute Break





Application Structure

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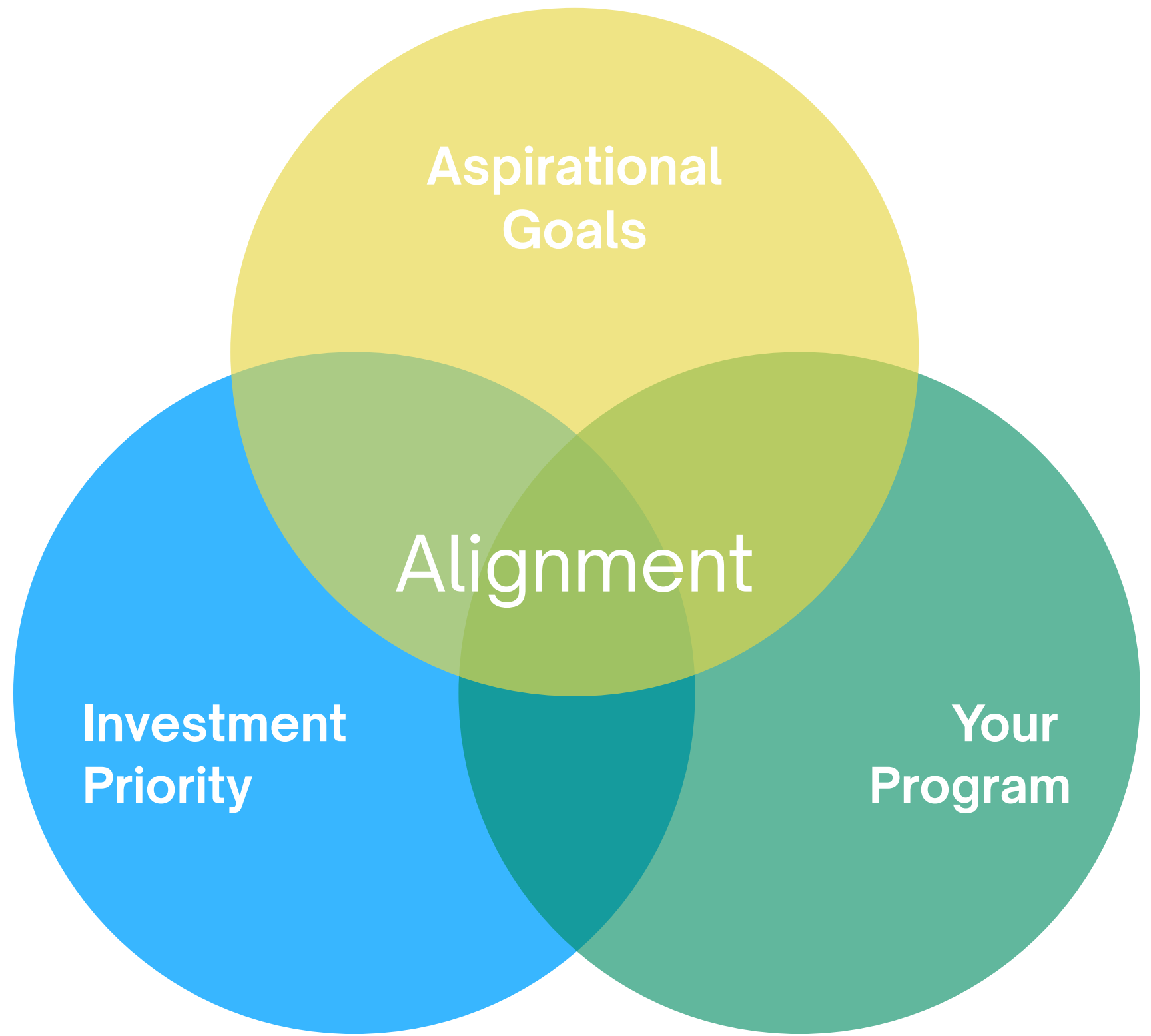
Finance

Supporting Documents

Application: Program Details

How does your program align with United Way's Aspirational Goals? (2500 Characters)

Please describe how your program helps meet at least one of UWSWPA's Aspirational Goals





United Way SWPA 2025 Aspirational Goals

Economic Mobility

Lift 6,600 households above the ALICE threshold across our five-county region.

Premier Human Services Coordinator

Position 211 as the foremost human services connector in southwestern Pennsylvania.

Civic engagement and community momentum

Build civic engagement that gives people hope that change is possible and provides ways to take action.

Nonprofit sector capacity building

Build capacity at our partner agencies to encourage innovation and help the sector achieve greater efficiency and effectiveness.

Young People's Success pipeline

Ensure young people are prepared for success, starting at kindergarten readiness through career pathway completion.

Community Voice and Advocacy

Amplify community voices and drive policy change that helps people thrive.

[For more information about UW SWPA's Aspirational Goals](#)



Strong Aspirational Goal Responses

How **specifically** does our program align with at least one of United Way's Aspirational Goals?

Have you **specifically** referred back to the United Way's strategy for reaching the aspirational goal?

[United Way SWPA's Aspirational Goals](#)

Have we included **measurable** results or outcomes that demonstrate impact?

Application: Program Details

What community need(s) does your program address?* (3000 Characters)

What

is the need?

Why

is it compelling?
Data and Examples?

How

does it align with
UWSWPA Investment
Priorities?

Application: Program Details

Organizational readiness and local relevance* (3,000 Characters)

Why you are uniquely equipped to run this program, in your area, for the population you serve?

Some examples might include:

Data Derived
Programming

Cultural
Awareness and
Education

Team Reflects
Diversity of
Community

Established
Community
Partnerships



Application: Program Details

Program Description (5,000 Characters)

Focus on introducing and describing the program so the reviewers can understand and envision it.

WHO: Who is your intended population?

WHAT: Have you explained the details about how this will operate and function?

WHERE: Where is the community you are serving?

HOW: Is it clear how it addresses the specific needs you noted?

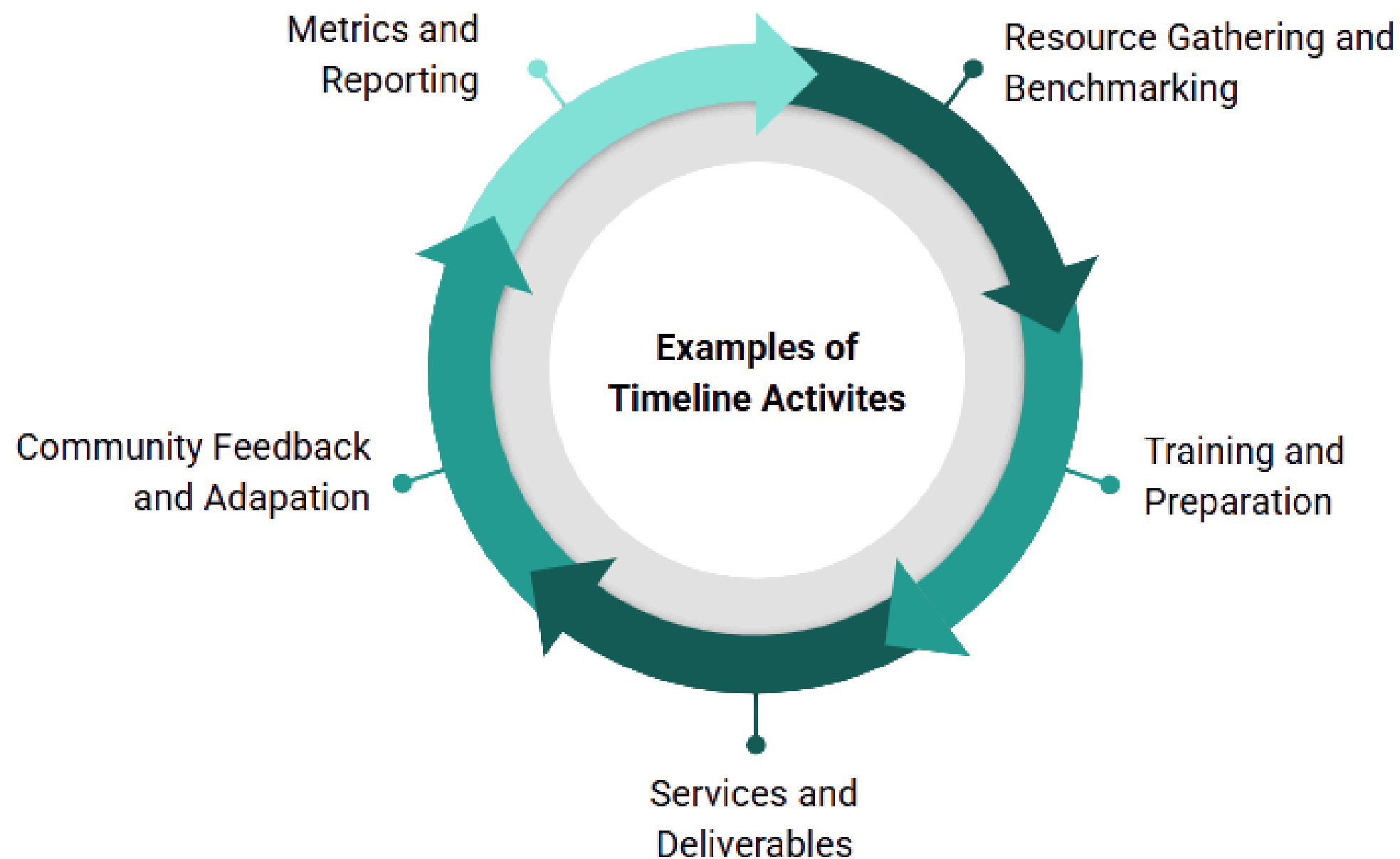
HOW: How or why is YOUR organization equipped to provide this program?

WHY: Why will it be a success? (Measurable Impact)

Application: Program Details

Program Activities and Timeline (one year)

Describe your program activities and timeline for the first year of the grant period. Please feel free to include bulleted lists. (3,000 Characters)





Application: Program Details

Please list any existing or planned collaborations and partnerships with other organizations for this program and briefly describe their role. (1,500 Characters)

Stick to current partners engaged for this program.

Application: Program Details

Community Voice: How does your organization consider community need to inform design and changes to programming? (3,000 Characters)

Some examples include:

Surveys

Community
Advisory Groups

Partnerships with
Local Trusted
Organizations

Community Events

Focus Groups and
Pilots

Application: Program Details

Who do you serve through this program?* (1500 Characters)

Examples may include: middle school students, single mothers with small children, older adults, veterans, families, etc.

We serve 100 elementary age Children in Butler County

General



We serve 42% of enrolled 3rd grade students within XX School District who begin the year below grade-level proficiency.

Specific

Application: Program Details

What communities does your program serve?*

Please select the area(s) that you serve based on the [linked map](#).

- Armstrong
- Butler
- Fayette
- Westmoreland
- Allegheny 1
- Allegheny 2
- Allegheny 3
- Allegheny 4
- Allegheny 5
- Allegheny 6
- Allegheny 7
- Allegheny 8
- Allegheny 9
- Allegheny 10
- Allegheny 11
- Allegheny 12
- Allegheny 13
- Allegheny 14

What communities does your program serve?*

Please select the area(s) that you serve based on the [linked map](#).

- Don't be a Happy Clicker
- Actual not Aspirational

Optional 500 character space to add context



Application Structure

Program

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Outcomes

Outcome 1 - People Served*

Goal Number of People Served

Outcome 1- Corresponding UWSWPA Strategy*

Outcome 1- Method to Track/ Measure Success*

B / i / U / [List Icon] / [List Icon] / [List Icon]

500 characters left of 500

Approximately how many of the people you expect to serve in Outcome 1 are below the ALICE threshold?*

For more information on ALICE and the survival threshold [CLICK HERE](#)

How do you plan to estimate or track the number of people below the ALICE threshold that you serve?*

1,500 characters left of 1,500

Provide 1-3 Outcomes

1. Name the Outcome (#1 People Served)

Outcome = Impact Metric

1. Determine the strategy
2. Define method for tracking/measurement
3. Estimate ALICE threshold population
4. Define ALICE threshold tracking plan

10 Minute Break





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Budget

Total Request Amount (annual)

Total request should be based on one year, July 1, 2026- June 30, 2027.

- Realistic (not over or under)
- Supported by Budget
- Transparency about what you need
(Operational too)



Budget

A budget is your annual financial plan that converts your organizational goals into dollars and cents.

Why have a Budget?

To project how much income can realistically be secured to meet expenses related to accomplishing this year's goals.

To monitor actual income and expense performance against what was projected.



Budget Template

Two Tabs in the workbook:

Guidance

- provides info about terms and directions

Budget

- Revenue and Expenses

PROGRAM BUDGET - Review the tab titled "Guidance" before completing this template.		
PROGRAM REVENUE (please edit line items as needed)	Committed Funds	Pending Funds
Grants/Contributions		
United Way Southwestern Pennsylvania (Include in "Pending Funds" column)	\$ -	\$
Government Grants	\$	\$
Foundations (itemize on separate lines)	\$	\$
Foundation X	\$	\$
Foundation Y	\$	\$
Foundation Z	\$	\$
Corporations (itemize on separate lines)	\$	\$
Corporation X	\$	\$
Corporation Y	\$	\$
Corporation Z	\$	\$
Individuals	\$	\$
	\$	\$
Other (please specify)	\$	\$
	\$	\$
	\$	\$
Earned Revenue		
Program fees	\$	\$
Contracts and Events	\$	\$
	\$	\$
	\$	\$
In-Kind Support	\$	\$
Other (itemize on separate lines)	\$	\$
	\$	\$
	\$	\$
Subtotals for Committed or Pending Revenue <i>calculated field</i>	\$ -	\$ -
Total Program Revenue <i>calculated field</i>	\$ -	
PROGRAM EXPENSE (please edit line items as needed)	Not Requested in this Proposal	Expenses Requested in this Proposal
Direct Expenses		
Personnel (including benefits)	\$	\$
Project Specific Marketing and Communications	\$	\$
Equipment and Supplies	\$	\$
Other (itemize on separate lines)	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
Indirect Expenses		
Management and General	\$	\$
Marketing and Communications	\$	\$
Fundraising	\$	\$
	\$	\$
Subtotals for Expenses Requested or Not Requested <i>calculated field</i>	\$ -	\$ -
Total program expenses (<i>calculated field</i>)	\$ -	
SURPLUS/(DEFICIT) <i>calculated field</i>	\$ -	



Budget : Program Revenue

Contributed Revenue

- Committed vs Pending

Earned Revenue

- Committed vs Pending

PROGRAM BUDGET - Review the tab titled "Guidance" before completing this template.		
PROGRAM REVENUE (please edit line items as needed)	Committed Funds	Pending Funds
Grants/Contributions		
United Way Southwestern Pennsylvania (Include in "Pending Funds" column)	\$ -	\$
Government Grants	\$	\$
Foundations (itemize on separate lines)	\$	\$
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Individuals	\$	\$
	\$	\$
Other (please specify)	\$	\$
	\$	\$
	\$	\$
Earned Revenue		
Program fees	\$	\$
Contracts and Events	\$	\$
	\$	\$
	\$	\$
In-Kind Support	\$	\$
Other (itemize on separate lines)	\$	\$
	\$	\$
	\$	\$
Subtotals for Committed or Pending Revenue <i>calculated field</i>	\$ -	\$ -
Total Program Revenue <i>calculated field</i>	\$ -	



Budget : Program Expenses

- Requested vs Not Requested
- Direct Expenses
- Indirect Expense

PROGRAM EXPENSE <i>(please edit line items as needed)</i>	Not Requested in this Proposal	Expenses Requested in this Proposal
Direct Expenses		
Personnel (including benefits)	\$	\$
Project Specific Marketing and Communications	\$	\$
Equipment and Supplies	\$	\$
Other (itemize on separate lines)	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
Indirect Expenses		
Management and General	\$	\$
Marketing and Communications	\$	\$
Fundraising	\$	\$
	\$	\$
Subtotals for Expenses Requested or Not Requested <i>calculated field</i>	\$ -	\$ -
Total program expenses <i>(calculated field)</i>	\$ -	
SURPLUS/(DEFICIT) <i>calculated field</i>	\$ -	

Budget Narrative

Your narrative is the story version of your budget.

Clarify any information that is not obvious in your financial documents

Make sure the narrative maps to the budget

Include Staffing details (title, role, FT/PT)

Highlight diversified funding

Budget : Funding Amounts

If you receive less funding than requested, how will that impact your programming?

This is a question about sustainability.

What are some of the challenges you anticipate and how will you address them?

Provide any concerns about your program's capacity and sustainability, and what alternative plans have worked for the organization in the past.

Budget: Financial Resources

- <https://www.techsoup.org/>
- <https://boardsource.org/>
- <https://www.councilofnonprofits.org/tools-resources/financial-management>
- <https://www.wallacefoundation.org/knowledge-center/resources-for-financial-management/pages/default.aspx>
- <https://www.propelnonprofits.org/resources/12-golden-rules-nonprofit-finance/>
- <https://www.nonprofitaccountingbasics.org/reporting-operations/financial-management>
- <https://supportcenteronline.org/influencing-the-field/nonprofit-resources/>
- <https://www.guidestar.org/>



Application Structure

Program

Investment Priority

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Supporting Documents

Other Documents

Form 990

Financial Audit

Logic Model (Optional)

Other (Optional)

Acknowledgement of Expectation (Checkbox)



PACE Office Hours

We are here to be a resource!

- **Review and revise and Review again**
- **Submit Early**
- **Reach out**
- **Schedule office hours**



Schedule a session

General Questions: mrichardson@pacepgh.org

Include on Subject: United Way

Thank You!



But What About.....



What about AI?

Yes, you can. However,

Consider these tools collaboration partners rather than authors.

- Output still sounds very much like AI
- Look for bias
- Provide robust context
- Iterate to refine
- You know your program best



Copilot



ChatGPT



perplexity