UNITED WAY
Ocoee Region

2027-2028 IMPACT FUND

COMMUNITY IMPACT BLUEPRINT

TURNING DATA INTO DIRECTION. UNITED FOR LASTING CHANGE.

A shared vision to build a stronger, healthier, more resilient and stable community across Bradley and Polk Counties.

OUR WHY. OUR COMMUNITY. OUR OPPORTUNITY.

Every community has challenges.
What defines us is how we unite to address them.

The Ocoee Region is a community of opportunity, resilience, and extraordinary generosity. Across Bradley and Polk Counties, families, businesses, nonprofits, and community leaders work every day to create a stronger future for the people who call this region home.

But opportunity is not experienced equally by everyone.

For many local families, the rising cost of housing, childcare, healthcare, food, and transportation makes it increasingly difficult to achieve financial stability. Working hard does not always mean getting ahead. And when one essential need becomes unaffordable, the consequences can extend into every other area of a family's life.

United Way of the Ocoee Region believes lasting change begins with understanding our community's needs, bringing the right people together, and aligning resources around solutions that make a measurable difference.

The Community Impact Blueprint establishes a shared direction for that work. Grounded in local data, informed by community expertise, and driven by collaboration, it identifies where our region faces its greatest challenges and where collective action can create meaningful progress.

Our belief is simple: When we work together under a shared blueprint, we can build a community where everyone has the opportunity to thrive.

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OUR FRAMEWORK

VISION

We envision a thriving Ocoee Region where every individual and family has the opportunity to achieve stability, well-being, and hope for a better tomorrow.

MISSION

The mission of United Way of the Ocoee Region is to be the community-based organization that leads the effort in identifying community needs, facilitating collaboration, and maximizing resources to positively impact our community and the surrounding area, including Bradley and Polk Counties (in southeastern Tennessee).

- **Identifying Community Needs** - our Community Needs Identification Committee (CNIC) determines our service area's most pressing needs by analyzing national, regional, state and local data, including ALICE (Working Families) population statistics, and disseminates prioritized findings in an annual report.
- **Facilitating Collaboration** - driven by CNIC findings, United Way facilitates a strategic donor-driven allocation cycle that takes a holistic approach to funding programs that will move the needle to address our community's most pressing needs.
- **Maximizing Resources** - the true power of United Way is our ability to multiply through collaborative fundraising efforts that translate every dollar raised into a meaningful lifeline for neighbors in need.

THE POWER OF COLLECTIVE ACTION

Positive change begins with a single choice to give, to volunteer, or to raise your voice. When your generosity is combined with the actions of neighbors across our region, its impact multiplies. Through donor support, United Way of the Ocoee Region invests in grants, programs, and collaborative initiatives that address root causes, remove barriers, and deliver measurable results.

OUR COMMITMENT

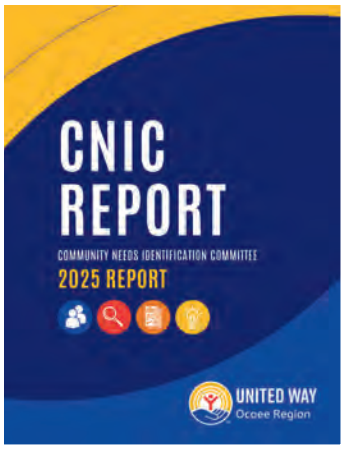
We are committed to an ongoing journey of listening, learning, and growing. United Way of the Ocoee Region holds itself - and its funded partners - accountable to advancing equity, strengthening trust, and fostering a more just and inclusive community for all.

LOCAL IMPACT. GLOBAL MOVEMENT.

United Way is part of a global network serving nearly 1,800 communities in more than 40 countries and territories, yet each United Way is locally governed and community-driven. Because local needs require uniquely-tailored solutions, your support always stays here - benefiting your neighbors, strengthening local organizations, and driving change close to home.

CNIC

Because when we understand needs clearly, we can respond boldly – and build a stronger Ocoee Region.



BEYOND STATISTICS - REAL BARRIERS TO STABILITY

United is the way to turn data into direction. The **Community Needs Identification Committee (CNIC)** is where listening becomes action. Through ongoing data review, community feedback, and trend analysis, CNIC identifies the most urgent and emerging challenges facing the Ocoee Region. Their work ensures our decisions aren't based on assumptions, but on evidence.

FROM INSIGHT TO IMPACT

We take this responsibility seriously and every dollar entrusted to United Way is invested with purpose. CNIC findings directly shape our grantmaking and funding priorities, guiding resources toward solutions that create lasting, measurable change. This is how we move beyond temporary relief and invest in long-term stability for families in our community.

2025 COMMUNITY NEEDS IDENTIFIED

- Stable Housing
- Access to Quality Childcare
- Access to Healthcare
- Mental Health and Substance Misuse

EMERGING COMMUNITY NEEDS

- Transportation
- Domestic Violence
- Aging Population Needs
- ESL/Language Support Services

INTERSECTING ISSUE

- Financial Instability

DOWNLOAD THE COMPLETE 2025 CNIC REPORT

CNIC PRIORITY AREAS - TOP TAKEAWAYS

Stable Housing

Housing costs are overwhelming families. Almost half of Ocoee Region renters are spending 30% or more of their monthly income on housing.

Access to Quality Childcare

Childcare is consuming a growing share of income. Families earning the median household income spend 40% of their income on childcare.

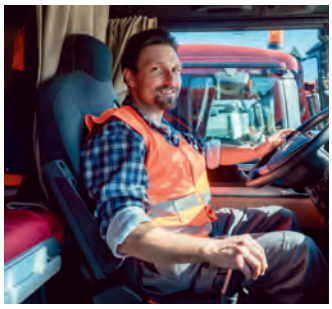
Access to Healthcare

Too many low-income residents are uninsured. An average of 25% of low-income individuals in the Ocoee Region are uninsured.

Mental Health and Substance Misuse

Gaps in access and affordability remain significant. In Polk County specifically, the ratio of individuals to mental health providers is 6.5 times higher than the state average.

ALICE IS 42% OF US





UNITEDFORALICE.ORG

WE WORK FOR THE WORKING FAMILIES BEHIND OUR COMMUNITY.

Working hard should be enough to make ends meet. For too many of our neighbors, it isn't.



Understanding ALICE helps us see beyond traditional poverty measures and recognize the full picture of financial hardship in our region. It challenges us to look closer, think differently and work together to create a community where every individual and family has the opportunity not just to survive, but to thrive.

ALICE stands for **Asset Limited, Income Constrained, Employed.** ALICE is our neighbor, our coworker, the provider caring for our children, the teacher shaping the next generation, the aide caring for our families and the essential employee serving our community. They are people who work hard, play by the rules and want the same things we all want: a safe place to call home, reliable transportation, quality childcare, access to healthcare and the opportunity to provide a better future for their families.

While many ALICE households earn above the federal poverty level, they still struggle to afford the true cost of living. One unexpected car repair, medical bill, missed paycheck or increase in rent can push an already stretched household into financial crisis. These families may not be counted in traditional poverty statistics, but their financial struggles are real – and their challenges affect the strength and well-being of our entire community.

2 IN 5

Ocoee Region Families are ALICE or Below

$83,652
is the minimum survival budget for a family of four in Bradley County

$67,488
is the median household income in the Ocoee Region

77%
of local single-parent households live below the ALICE Threshold

ACTION DRIVES IMPACT

UNITED IS THE WAY TO CREATE CHANGE

Six priorities. One shared commitment to a stronger Ocoee Region.

STRENGTHEN THE NONPROFIT NETWORK



We are building a stronger, more connected network of nonprofit organizations equipped to meet our community's evolving needs. Through strategic partnerships, capacity building, shared resources and collaborative problem-solving, we help strengthen organizations, expand their reach and maximize their impact.

By encouraging innovation and coordinated approaches, we are creating a more responsive and sustainable network of support – one that addresses immediate needs while helping individuals and families achieve long-term stability.

ALIGN RESOURCES WITH COMMUNITY NEEDS



We are directing investments, partnerships and resources toward the most pressing needs and greatest opportunities for impact throughout Bradley and Polk Counties. Guided by local data, community insight and measurable outcomes, we work to identify service gaps, prioritize opportunities and ensure resources are aligned with shared community goals.

Through strategic investments, collaborative funding and accountability, we strive to maximize the impact of every dollar, partnership and initiative – creating meaningful progress and lasting solutions.

EXPAND ACCESS TO ESSENTIAL RESOURCES



We are strengthening the network of services that helps individuals and families meet immediate needs and move toward greater stability. Through partnerships and coordinated efforts, we help connect residents to essential resources, including food, housing, healthcare, childcare, utility assistance and mental health support.

By improving resource, housing and childcare navigation, strengthening referral networks and amplifying services like 211, we are making it easier for people to find help when they need it most. We also help mobilize community resources during times of crisis, strengthening our region's ability to respond and recover.

CHAMPION COMMUNITY SOLUTIONS



We are bringing community voices, local leaders and decision-makers together to address the underlying challenges affecting individuals and families. By leveraging local data, elevating community needs and fostering cross-sector collaboration, we help advance solutions that expand opportunity and improve quality of life.

Through partnerships with businesses, policymakers and community organizations, we champion progress in areas such as affordable housing, healthcare, quality childcare, education, financial stability and mental health – moving beyond short-term responses toward lasting community change.

ENGAGE AND MOBILIZE BUSINESS PARTNERS



We are cultivating meaningful partnerships with local businesses and employers to harness their leadership, resources and influence for community good. Through corporate partnerships, workplace giving, volunteer opportunities and shared initiatives, we connect businesses with meaningful ways to invest in the communities where their employees live and work.

By encouraging business engagement in workforce well-being, family stability and community solutions, we are building partnerships that strengthen local employers, support families and contribute to a thriving regional economy.

INSPIRE GIVING AND COMMUNITY ENGAGEMENT



We believe everyone has something meaningful to contribute to building a stronger community. We connect individuals, families, young professionals and community leaders with opportunities to give, volunteer, advocate and make a difference.

Through leadership giving, volunteer initiatives, engagement groups and community-wide events, we cultivate a culture of generosity and service. By connecting people's passions and talents with community needs, we turn individual commitment into collective action and lasting impact.

OUR IMPACT PRINCIPLES

HOW WE LEAD. HOW WE INVEST. HOW WE CREATE LASTING CHANGE.

1. Prioritize Results and Accountability

We believe impact should be measured by more than dollars raised or services delivered. We prioritize results-based accountability by establishing clear priorities, measuring outcomes and evaluating progress to understand whether our efforts are making a meaningful difference. We remain committed to transparency, continuous learning and using results to strengthen our approach and maximize community impact.

2. Focus on Long-Term Sustainability

We believe lasting change requires solutions that extend beyond immediate needs. We invest in strong partnerships, sustainable programs and collaborative approaches that address underlying challenges and create lasting opportunities for individuals and families. Our goal is not simply to respond to today's challenges, but to help build a stronger foundation for tomorrow.

3. Lead with Data and Community Insight

We believe informed decisions lead to stronger solutions. We use local data, research, community feedback and emerging trends to identify critical needs, understand the challenges facing our region and guide our investments. By looking beyond the numbers and listening to the people behind them, we can better identify gaps, prioritize resources and measure progress toward a thriving community.

4. Honor Donor Intent and Invest with Purpose

We recognize that every contribution represents someone's belief in a better community and a desire to make a difference. We honor that generosity through responsible stewardship, donor-driven investments and a commitment to directing resources toward meaningful community outcomes.

5. Serve with Empathy and Purpose

We believe every individual deserves to be treated with dignity, compassion and respect. We approach our work with an understanding that everyone has a unique story, challenges and strengths. We listen before we act, value lived experiences and work alongside individuals and community partners to create solutions that both meet people where they are and recognize their potential.

6. Drive Action by Stabilizing Families

We believe stable families are the foundation of strong communities. We focus on connecting individuals and families to the resources, relationships and opportunities that help them move from crisis to stability and from stability to long-term success. By addressing essential needs, reducing barriers and creating pathways to opportunity, we are helping families build brighter futures and laying the groundwork for a healthier, stronger and more resilient Ocoee Region.



At United Way of the Ocoee Region, we believe a thriving community is built when people have the resources, opportunities and support they need to achieve stability and reach their full potential. Our approach is rooted in collaboration, compassion and a commitment to meaningful results.

We lead with purpose, listen to the needs of our community and bring people and resources together to address the challenges that stand between families and a brighter future. These principles guide our decisions, shape our investments and hold us accountable to the impact we strive to make.

2027-2028 IMPACT FUND RFP

United Way of the Ocoee Region (UWOR), serving Bradley and Polk counties, is pleased to announce the release of its Request for Proposals (RFP) for the 2027–2028 Community Impact Fund Grant Cycle.

Grant-funded programming will support community initiatives delivered during the period of July 2027 through June 2028. Through this funding opportunity, UWOR seeks to partner with Ocoee Region organizations that are committed to addressing critical community needs and creating meaningful, measurable impact.

ELIGIBILITY AND FUNDING REQUIREMENTS

All 501(c)(3) agencies serving Bradley and Polk Counties that are meeting or seeking to meet community needs in the areas of **Stable Housing**, **Childcare Access**, **Healthcare Access**, and **Mental Healthcare and Substance Misuse Support** are invited to apply.

To be eligible for funding, an agency must submit or execute the following:

1. IRS 501(c)(3) Determination Letter
2. Specify which of the Four Areas that will be addressed by the applying program
3. Recent Independent Audit Report (or approved financials and completed screening if audit is not required)
4. List of current Board Members, officers, and contact information (frequency of Board Meetings and date of Board Meeting when this application to apply for funding was approved)
5. Ability to track Program Outcome Indicators (overall performance) and report to UWOR as requested
6. Be willing to participate in UW Partner Roundtable discussions as available within the funding cycle
7. Promote UW partnership in marketing efforts and special events if program is funded

APPLICATION PROCESS

Letters of Intent and Proposals are to be submitted electronically at:
https://agency.e-cimpact.com/login.aspx?org=45050F

FUNDING TIMELINE AND DEADLINES

Friday, December 18, 2026 by 5 p.m.	**Letter of Intent Due**
January 2027	**Notice of Full Application Status**
Friday, February 19, 2027 by 5 p.m.	**Full Proposal Due**
Early June 2027	**Announcement of Grant Awards (all decisions final)**
Funds may be used from July 1, 2027 through June 30, 2028 The final day to request funds through "Reimbursement" portal is June 10, 2028.	

QUESTIONS

Please direct questions to Shawna Staup, Director of Community Impact, at **shawnastaup@unitedwayocoee.org**.



FOCUS AREA ONE: STABLE HOUSING

OUR BOLD IMPACT GOAL

EXPAND HOUSING STABILITY AND BUILD PATHWAYS TO OPPORTUNITY FOR LOW-INCOME AND ALICE FAMILIES.

PROGRAMMING NEEDS - PRIORITY STRATEGIES TO DRIVE RESULTS

- Offer eviction prevention programs/case management: financial counseling, budget planning, coordination with agencies that might provide other support in emergency situations
- Provide rapid rehousing – short-term rental assistance to prevent eviction or to help clients exit homelessness rapidly
- Provide coordinated emergency housing – collaboration among agencies to find suitable temporary housing
- Increase availability of new housing for low income to ALICE (Asset Limited, Income Constrained, Employed) families and first-time homebuyers
- Increased availability of new and existing housing that meets habitability standards around health, safety, accessibility, and basic housing needs
- Remove barriers to stable housing (financial readiness, credit counseling, legal assistance, ESL/aging/disabled population support, etc.)

INDICATORS OF SUCCESS - HOW WE WILL MEASURE IMPACT

1. # of clients who obtained case management so they could remain in their current housing, avoid eviction, or avoid foreclosure
2. # of clients who maintained current housing due to rental and mortgage assistance and/or utilities assistance
3. # of clients who received temporary emergency housing
4. # of clients who obtained affordable permanent housing
5. # of clients who exercised their housing rights to avoid eviction
6. # of clients who became first-time homeowners
7. # of additional affordable housing units made available for low-income clients
8. # of additional affordable housing units made available for ALICE clients
9. # of rentals made habitable for low-income or ALICE households
10. # of clients receiving support to remove barriers to stable housing (financial readiness, legal assistance, special population support, etc).



FOCUS AREA TWO: CHILDCARE ACCESS

OUR BOLD IMPACT GOAL

EXPAND ACCESS TO AFFORDABLE, QUALITY CHILDCARE THAT SUPPORTS ALICE FAMILIES DURING OUT OF SCHOOL OR WORKING HOURS.

PROGRAMMING NEEDS - PRIORITY STRATEGIES TO DRIVE RESULTS

- Increase capacity for affordable and accessible licensed childcare during working hours
- Offer affordable childcare after-school and during school breaks
- Implement workplace childcare programs and trainings for individuals interested in starting in-home programs
- Provide financial assistance for childcare for low-income and ALICE families
- Develop a childcare advocacy or childcare navigation program to connect families in need childcare assistance
- Remove barriers to accessible childcare

INDICATORS OF SUCCESS - HOW WE WILL MEASURE IMPACT

1. # of childcare aged children placed in childcare programs during work hours
2. # of clients placed in after school and school break childcare programs
3. # of new or additional childcare programs (in-home or workplace)
4. # of families receiving financial assistance for childcare
5. # of clients who found childcare through participation with childcare navigation or advocacy program
6. # of childcare certificates made available for low income and ALICE families
7. # of new childcare centers accepting childcare certificates
8. # of clients receiving support to remove barriers to accessible childcare



FOCUS AREA THREE: HEALTHCARE ACCESS

OUR BOLD IMPACT GOAL

EXPAND ACCESS TO AFFORDABLE, QUALITY HEALTHCARE FOR UNDERSERVED INDIVIDUALS AND FAMILIES.

PROGRAMMING NEEDS - PRIORITY STRATEGIES TO DRIVE RESULTS

- Increase access and affordability to primary healthcare services for uninsured or underinsured
- Assist individuals in obtaining public or private health insurance
- Improve care coordination/navigation within or across the health care delivery systems
- Work with healthcare and mental health providers to set negotiated rates for uninsured and underinsured clients
- Access to healthy food for vulnerable populations
- Increase access and affordability to healthcare services for uninsured/underinsured Polk County residents, including dental services

INDICATORS OF SUCCESS - HOW WE WILL MEASURE IMPACT

1. # of clients obtaining healthcare services including dental services
2. # of clients that were provided emergency assistance for payment of healthcare bills
3. # of clients obtaining health care insurance
4. # of clients finding specialized healthcare providers
5. # of healthcare providers with negotiated lower rates for uninsured or underinsured clients
6. # of clients (within a vulnerable population) receiving healthy food/nutrition services



FOCUS AREA FOUR: MENTAL HEALTH AND SUBSTANCE MISUSE SUPPORT

OUR BOLD IMPACT GOAL

EXPAND ACCESS TO MENTAL HEALTH AND RECOVERY SERVICES FOR INDIVIDUALS AND FAMILIES.

PROGRAMMING NEEDS - PRIORITY STRATEGIES TO DRIVE RESULTS

- Work with mental health providers to set negotiated rates for uninsured and underinsured clients
- Increase access and affordability of mental health care services
- Increase capacity for psychoeducational opportunities (intentional education about mental health, coping, disorders, trauma informed practices, etc. Examples include anger management classes, depression/anxiety screenings, suicide prevention, domestic violence prevention, etc.)
- Increase access and affordability of substance abuse services

INDICATORS OF SUCCESS - HOW WE WILL MEASURE IMPACT

1. # of mental health providers with negotiated lower rates for uninsured or underinsured clients
2. # of clients receiving mental health care or counseling
3. # of clients receiving psychoeducational opportunities through programs such as anger management classes, depression/anxiety screenings, suicide prevention, domestic violence prevention, trauma informed trainings, etc.
4. # of clients receiving substance misuse treatment services

COMMUNITY IMPACT CYCLE

1

COMMUNITY NEEDS IDENTIFICATION COMMITTEE

- Collect data on community needs
- Identify needs and themes from funded partner reports
- Release report with prioritized needs in Bradley and Polk Counties

REQUEST FOR PROPOSAL

- Based on CNIC Report, Focus Areas and Indicators are released for nonprofits to drive applications

2

3

LETTERS OF INTENT

- Nonprofit partners submit a brief proposal, or Letter of Intent, to specify request amount, focus Area and program details
- Reviewed by Community Impact Team (CIT) for next round

FULL APPLICATIONS

- If approved by CIT, nonprofit partner submits detailed application
- Target population need, projected served, and financials reported

4

5

IMPACT PANEL RECOMMENDATIONS

- Teams of Impact Panels review full applications
- Nonprofit partners answer panel questions
- Panels provide feedback and make funding recommendations

FINAL FUNDING DECISIONS

- CIT reviews funding recommendations
- Identified as funded by Health Endowment or Campaign
- Recommendations reconciled with actuals
- UW Board approves final funding decisions

6

7

AGENCIES FUNDED | REPORT ON NEEDS & OUTCOMES

- Nonprofit partners notified of grant status
- Funds drawn down and reviewed monthly or quarterly
- Funded partners report on needs, target population and indicators

COMMUNITY IMPACT AT A GLANCE

United Way of the Ocoee Region moves the needle on our community's most pressing issues in a holistic approach. We are not just a funnel-through, but are able to impact our community in the following ways:

FUNDED PARTNER AGENCIES

- Local nonprofits apply for United Way funding under a targeted focus area
- Programs report on impact and needs

INTERNAL PROGRAMS

- Internal programs fill gaps around greatest needs:
  - Stable Families Program
  - 211 Resource and Referral Hotline
  - AmeriCorps VISTA
  - Read United (Imagination Library)
  - William Hall Rodgers Christmas Program
- Innovative and collaborative approaches ensure we make the most of every dollar

COMMUNITY COALITIONS

- United Way facilitates community coalitions around focus areas
- Partners meet to create solutions

COMMUNITY AND NONPROFIT TRAININGS

- Trainings provide best-practices for nonprofit partners to maximize impact
- Lead United Nonprofit Summit is offered as an afforable means of professional development every other fall

UWOR BOARD OF DIRECTORS

EXECUTIVE COMMITTEE

Bill Martin, Chairman
Pinnacle Financial Partners

Bruce Bradford
Community Advocate

Dr. Linda Cash
Bradley County Schools

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Jennifer Sheely
Blair Deacon
Shawna Staup
Hailey Wood
Ellie McConville

UWOR Navigator Team
Olivia Gaines
Maria McCarthy
Mayra Pineda

UWOR VISTA Team
Michaela Moore



UNITED WAY
Ocoee Region

UNITED IS THE WAY

Because it takes all of us.

THANK YOU FOR YOUR PARTNERSHIP

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