

# A. Executive Summary

Completed by [jessica.mckee@upwards.com](mailto:jessica.mckee@upwards.com) on 2/13/2024 3:23 PM

Case Id: 25291

Name: Upwards, Inc - 2024/25

Address: 5521 N University Drive Suite 104, Coral Springs,

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## A. Executive Summary

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PLEASE READ: Before proceeding with the application, please [CLICK HERE](#) to review the Notice of Funding Availability and additional application information.

Once you have reviewed this document, please continue with the application below.

### AGENCY INFORMATION

#### A.1. Agency Name

WeeCare, Inc. (DBA, Upwards)

#### A.2. Type of Organization

Corporation

#### If Other:

#### A.3. Mailing Address

5521 N University Drive Suite 104 Coral Springs, FL 33067

#### A.4. Contact Person

Jessica McKee

#### A.5. Title

Community Impact Account Manager

#### A.6. Telephone

(805) 539-7848

#### Phone Ext.

#### A.7. Email

[jessica.mckee@upwards.com](mailto:jessica.mckee@upwards.com)

#### A.8. Unique Entity ID #

HRBLHQGMG4T5

### BILLING/INVOICE CONTACT

#### A.9. Name

Amanda Smith

### PROJECT INFORMATION

#### A.15. Project Title

BOOST (Business Operation & Optimization Support Tools)

#### A.16. City of Largo Funds Requested

\$212,086.00

Public Services (Supportive Services) \* must have a minimum of \$10,000 in funding request.

Public Facility Capital Projects-\* must have a minimum of \$40,000 in funding request.

#### A.17. Type of Project:

- Homeless Shelter Services
- Non-Homeless Special Needs Services
- Rental Eviction Prevention Services
- Public Facility Capital Project-Improvements
- Public Facility Capital Project-Facility Expansion
- Public Facility Capital Project-Add New Facility
- Other

#### If Other

Economic Development, Microenterprise Assistance

**A.10. Email**

amanda@upwards.com

**A.11. Phone**

(310) 853-8791

**A.12. DATA/REPORTING CONTACT**

**A.12. Name**

Judy Ahumada

**A.13. Email**

judy@upwards.com

**A.14. Phone**

(310) 507-9393

## B. Project Information

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## B. Project Information

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Please provide the following information.

**B.1. Project Purpose and Description- Describe the project and explain why the project is needed. This description should include the entire project, in addition to portions of the project not requested for funding from the City.**

**Provide data in support of the request. Examples: Energy improvements will reduce utility costs by X% annually, which allows an estimated \$\_\_\_\_\_ in operating funds for direct client services; or data shows a waiting list of # of people/deficiency in available space of # capacity to serve Largo residents**

Largo has over 3,059 children under 5 years old who call the City home. This age range is a critical time in a child's development. As the Annie E. Casey Foundation explains, there are many benefits of early care and education that happen before a child even steps into a kindergarten classroom. Being exposed to quality early care promotes crucial brain development, socialization skills, school readiness and even shapes future factors like health outcomes and employment opportunities as adults (2023). Early care and education is universally recognized as a pillar for eradicating poverty and promoting peaceful development. UNESCO, The United Nations Educational, Scientific and Cultural Organization, has proclaimed that "early childhood care and education is more than preparation for primary school. It can be the foundation for emotional wellbeing and learning throughout life and one of the best investments a country can make as it promotes holistic development, gender equality and social cohesion" (2023).

According to U.S. Census data, there are about 1,326 households with a child under 6 years old in Largo (2021). That means that thousands of families potentially need full or part-time childcare to support their well-being and quality of life. Without this type of support, many parents – particularly mothers – cannot join or rejoin the labor force, decreasing workforce participation, prolonging local economic recovery, and increasing the social inequities that stunt progress. This makes investing in childcare a two-generation solution for working families, giving kids an educational jumpstart while also helping parents return to the workforce. (U.S. News and World Report, 2022).

We live in an era where dual incomes are a necessity to make ends meet. Therefore, with working families as the norm, childcare has become an essential service that families and the workforce at large depend on. For single parents, reliable childcare is a means of survival and the difference between housing stability and homelessness. Largo has [# OF CHILDREN UNDER 6 LIVING WITH ONE PARENT COUNTY 2] children who live with a single parent (U.S. Census, 2021). Single-headed households and renter households with low income and significant childcare costs are at a high risk of becoming homeless (National Alliance to End Homelessness, 2022). Providing childcare to this vulnerable population can prevent homelessness, eliminate generational poverty, improve housing affordability, and promote upward economic mobility. For a family of 4 in Largo, childcare costs are one of the top three largest budget expenses, adding up to almost 20% of a family's income (Economic Policy Institute Family Budget Calculator, 2022).

Programs that decrease the cost of childcare are sorely needed. In addition to the direct benefits it has for children, accessible childcare can simultaneously improve housing affordability and stability for many families who call Largo home.

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Additionally, since licensed daycares can serve children up to 13 years of age, they can also provide before and after-school care for families with children in elementary and middle schools. School-based extended learning programs often fill up quickly. Therefore, daycares are an important resource for keeping older children and pre-teenagers safe and out of trouble.

**B.2. Describe the use that will be made of requested funds from the City of Largo. If the funding is being requested for specific staffing positions or specific components of a larger project, please provide these details and explain how this funding request ties in with the entire project.**

CDBG funds will specifically finance portions of salaries and associated fringe benefits for key staff members integral to the

execution of the BOOST program. This targeted use of funds ensures that essential personnel are adequately compensated

for their pivotal roles in the project, including:

Salaries: Financial support will be provided for roles critical to the program's success.

Fringe Benefits: CDBG funds will also cover the costs related to healthcare, payroll taxes, and other benefits for the staff

involved in the program, ensuring that the project is supported by a fully-equipped and motivated team.

Upwards commits to leveraging its resources to match CDBG funding, thereby covering all remaining expenses associated

with the program. This includes the costs for management software access and customization, marketing materials, translation services, program supplies, and operational overheads. This strategic financial planning allows CDBG funds to concentrate on supporting the program's core human resources, while Upwards' contribution enhances the program's overall infrastructure and capacity for delivering sustainable success to the childcare providers we aim to support.

**B.3. Describe how the project meets one or more of the City of Largo's 2024-2025 priorities:**

**1) To provide housing, homeless, and special needs services**

**2) To add, expand or improve public facilities that will provide supportive services to low-and moderate households**

Upwards' BOOST Program provides technical assistance and business support to microenterprise childcare providers who run in-home daycares. These facilities are classified as a microenterprise because they employ less than 5 employees, including themselves. They serve children ages 0-5 and up to age 13 with before/after school care. The program's goal is to expand economic opportunities for daycare providers by training them to use essential tools to make their operations more efficient. This enables them to reach their full revenue potential, expand overall capacity, and stabilize their jobs in the childcare industry. Daycare providers get personal guidance, relevant technology tools and learn best practices to grow and sustain their business, all while supporting LMI families in the community with childcare services. The BOOST Program also has a job creation component to the program, where Upwards supports the recruitment, background checking, training, and onboarding of new Teachers Assistants for these facilities as they expand their operations to more children in the community. Upwards is requesting 211,000 to pay for the program expenses to run BOOST for one year. This will benefit 35 LMI daycare owners, potentially create 11 LMI jobs, increase each childcare provider's skillset, and can benefit up to 420 LMI families seeking childcare. Upwards is designed to serve daycare providers and families 24 hours a day, every day of the year. BOOST participants will receive the same access to its services year-round. These services include:

Business Marketing Support

Family Matching Support  
Enrollment Support & First-day Coordination for Families  
Attendance Tracking  
Scheduling  
Electronic Child Profiles w/ Associated Health Data & Educational Assessments  
Billing & Invoicing  
Education & Curriculum Planning  
24/7 Technical Assistance & Training  
and so much more!

#### **B.4.**

**Provide information to substantiate the project as an “Eligible Activity” (described in the application instructions). Describe how the project, or the portion of the project funded by CDBG and/or SHIP, principally benefits low- and moderate-income Largo residents or low- and moderate-income areas in Largo (For CDBG clients/households whose annual income is less than or equal to 80% of area median income and for SHIP clients/households whose annual income is less than or equal to 140% of area median income).**

The BOOST program primarily benefits Low- to Moderate-Income (LMI) clientele and increases the availability and accessibility of economic opportunities for participating microenterprise, childcare providers with less than 5 employees. The program is limited to a specific target population, microenterprise daycare owners, and documentation of their income is recorded to ensure at least 51% of participants meet the income threshold. There is also a job retention and creation component to the program which is tracked among all participants. The BOOST Program foster the development and supports the expansion of microenterprise childcare providers by training owners sustainable business practices, providing the technical tools to maintain that sustainability once public funding is removed, and using 21st Century technology to support operational expansion and capacity building that leads to greater access to quality, affordable childcare for the entire community. BOOST's business and technical assistance includes: providing direct marketing support through Upwards' centralized family network to help childcare providers access new parents; family matching support that reduces the administrative burden on microenterprise owners, allowing them to focus on their business growth; enrollment automation and attendance tracking to eliminate manual errors and support revenue optimization with real-time capacity monitoring; electronic Child Profiles that track educational progress and associated health data, ensuring higher quality early education and supportive service referrals for families in need; education and curriculum planning that improves quality and desirability; and so many other general business support activities that foster microenterprise operational development and capacity building efforts.

#### **B.5. Describe the project area and client base that will benefit from this project (e.g. Citywide, countywide, Community Redevelopment District, homeless population, persons with HIV/AIDS, etc.)**

The target population for this program is low- and very low-income microenterprise owners who run licensed childcare facilities, also known as home daycares. This population is majority female-run, minority-owned microenterprise businesses who often serve as the primary income-earners in the household. The average earning of a childcare worker in Largo is \$12.92 an hour (Zippia, 2023), or about \$27,000 a year. Most of these childcare providers are located in opportunity areas and play a huge role in a neighborhoods revitalization efforts. The BOOST program is designed to accept participants based on a High-Risk/ High Need Assessments that reflect their personal situation and the area they serve. High-Risk factors include income, housing ownership (renters vs. owners), race/ethnicity, and other factors. High Need Areas include zip codes with high populations of single-headed households, Black and Hispanic families with children under six years old, and schools with high participation in free or

reduced-lunch programs.

As the Annie E. Casey Foundation explains, there are many benefits of early care and education that happen before a child even steps into a kindergarten classroom. Being exposed to quality early care promotes crucial brain development, socialization skills, school readiness and even shapes future factors like health outcomes and employment opportunities as adults (2023). Early care and education is universally recognized as a pillar for eradicating poverty and promoting peaceful development. UNESCO, has proclaimed that “early childhood care and education is more than preparation for primary school. It can be the foundation for emotional wellbeing and learning throughout life and one of the best investments a country can make as it promotes holistic development, gender equality and social cohesion” (2023). Unfortunately, quality affordable childcare can be one of the major service gaps in disadvantaged communities and communities of color, propagating generation poverty and increasing the inequities that exist.

### B.6. Project Area/Clients Served

*Submitted projects must provide services and/or benefit City of Largo residents*

**a) Provide data on the clients/households served by your agency for the same or similar service as the current project will provide.**

Clients/Households Served Prior Year	Number of Clients	% Low/Mod Clients
Total Clients Served with the same or similar service from October - September of the prior year:	0	0.00%
Of the Total Clients Served - the number of clients that were from Largo:	0	0.00%

**b) Provide data on clients/households to be served by your agency for the proposed project.**

Planned Program Year (Oct 2024-Sept 2025)	Number of Clients	% Low/Mode Clients
Total Estimated Clients/Households to be Served:	466	100.00%
Of the Total Estimated Served - number of Clients/Households from Largo	466	100.00%

### B.7. Client Eligibility:

a) Does this project ONLY serve any of the following groups (check off which group it will serve):

- Abused Children
- Battered Spouses
- Elderly Persons (62+)
- Homeless Persons
- Illiterate Adults
- Persons Living with AIDS
- Migrant Farm Workers
- Severely Disabled Adults

This project is not limited to any of these groups.

**b) If the project is NOT limited to serving one of the above groups, describe your agency's method for collecting demographic and income data from the clients served by this project. For new projects, explain what process will be used to ensure at least 51% of the clients served are below 80% of area median income.**

The program is limited to a specific target population, microenterprise daycare owners, and documentation of their income is recorded to ensure at least 51% of participants meet the income threshold. The household size and annual income of each program participant are documented in the application they are required to fill out. Upon intake, income is determined by self-certification by all participants. Source documentation like a W2 and/or bank statements will be collected from 20% of participants as suggested by HUD's CDBG guidelines. We require at least 51% of participants qualify as LMI, however we anticipate 100% of participants will have income qualifying income.

Upon implementation of the program, a thorough Provider Profile is created for each childcare provider, including proof of active license, comprehensive background check, copies of any licensing citations and clearances, and inspection reports. Upwards' providers are licensed and background-checked before being onboarded to our platform. Care coaches will review ratio schedules, activity plans, personnel rosters, environmental rating scale, and an individual environmental intake profile. The environmental intake profile will include equipment inventory records and descriptions, written policies for providing meals and snacks, and a ranking score after a full assessment. If a facility does not meet Upwards' standards, Care coaches will provide resources to improve the quality of their facility.

All providers will receive an orientation and training on how to use the app, how to set up their website listing, and training on how to market themselves. This includes guidance on how to take effective photos, how to write a compelling business description, and tips on which business characteristics to define and improve upon for potential customers. Initial training also covers best practices for financial management, conducting tours, and communication with families.

**c) If the project is limited to serving one of the above groups, describe how the demographic data (race/ethnicity) is collected (also required for reporting for CDBG-funded projects).**

N/A

### **B.8. Project/Program Outcomes**

**Describe the expected performance outcomes from the proposed project and any relevant performance measures or outcome data related to prior experience by the agency for the same or similar project/program (e.g. 50% of clients moved from shelter to permanent housing and it is anticipated that the proposed project will enable the agency to increase this outcome to 60% moved into permanent housing). For homeless programs, the City will also pull data from PHMIS to review past outcomes.**

The goal of the BOOST Program is to provide comprehensive business and technical support to Participating Microenterprise Childcare Providers, contributing to the establishment and maintenance of a robust and sustainable local childcare ecosystem. This enhances the overall sustainability of Low and Moderate Income (LMI) providers through operational stabilization and revenue maximization, which, in turn, improves the quality of life of the families they serve, creating a positive ripple effect throughout the City of Largo.

The BOOST Program identifies the following measurable outcomes:

**Outcome 1: 30% of Program Participants Will Report 20% More Gross Revenue**

The BOOST Program will result in 30% of Program Participants reporting 20% more gross revenue by the close of the program year. The BOOST Program provides targeted marketing support that enables Program Participants to expand

their capacity and earn more revenue by reaching maximum capacity.

#### Outcome 2: 35 LMI Jobs Retained & 11 LMI Jobs Created

The BOOST Program will result in 80% of Participating Childcare Providers remaining open throughout the program year and 30% of Participating Childcare Providers hiring a Teaching Assistant. That is 11 LMI childcare jobs created as a result of the business and technical support provided to Participating Providers to help them expand their facility capacity and digitize their operations.

#### Outcome 3: 30% of Program Participants Will Report Increasing the Total Number of Childcare Slots in Their Facility

The goal of the BOOST Program is to help Program Participants hire a Teaching Assistant to maximize their facility capacity so they can earn more and support more children in the community.

BOOST will measure and track its participants' various demographic and population characteristics to ensure accurate reporting and to measure the program's effectiveness. Upwards will submit monthly and quarterly reports to the City of Largo to evaluate the success of the objectives and ensure the communities being served are those that need it most. Microenterprise participants are required to report their income and household size to determine their LMI eligibility. If reports indicate that the desired populations are not being reached and/or served, Upwards will adjust its outreach strategy to make the program more accessible and equitable to LMI providers and families in need. BOOST thoroughly evaluates each daycare provider's business before, during, and after the program. Upwards is capable of capturing thousands of data points and will create thorough reports for the CDBG staff. The preliminary evaluation will be used as a baseline to compare a daycare's progress throughout the program.

Demographic information collected upon intake includes income, household size, facility size, industry experience, certifications and level of education, race/ethnicity, and age. The Care Specialists who assist the daycare providers use a centralized database to observe local trends and will communicate with the providers through app push notifications, text, or by phone. This means they can verify that a daycare provider has successfully received, read, and comprehended the information. With real-time data and feedback, Care Specialists can make nimble adjustments as needed.

BOOST will also obtain data via anonymous feedback surveys so participants, both childcare providers and families, can freely respond to questions about their experience. Family participants will have a similar pre and post-test collection of data that records income, employment, and frequency of childcare use. The key program indicators (KPIs) BOOST will use to determine the program's effectiveness will be measured continuously throughout the year. These include:

- The number of microenterprise childcare providers supported.
- The number of teaching assistant jobs created.
- The number of childcare provider jobs retained.
- Number of new childcare slots created.
- Revenue changes of daycare providers.
- Number of trainings completed.
- Number of provider and family support requests answered.
- The number of family tours scheduled and completed.
- Number of children enrolled.
- Self-reported hours saved on administrative tasks.
- Level of family engagement.

#### B.9. Relocation

*Printed By: Sheera Greene on 2/15/2024*



a) Will any residents be permanently displaced as part of this project?

No

If yes, explain

b) Residential Projects (*Applicants for residential projects only complete this section*)

i. Do/ will residents pay rent?

ii. If yes, how much and how are rents determined?

iii. Will residents receive rental subsidy/housing assistance?

No

iv. If residents will not pay rent, state the reason:

v. List the residential facilities and addresses of facilities presently operated by your agency

**B.10. Specific Site Location**

a) Has the project site(s) been selected

No

b) If yes, provide the address. For educational classes/seminars, please list the location(s) where the classes will be held:

Facility Name	Street Address	City	State	Zip
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**B.11. Project Administration**

a) Project Manager Name

Judy Ahumada

Title

BOOST Program Director

B.12. **Project-Specific Sections:** Please complete the sections below that are applicable to your project.

**DOWNPAYMENT ASSISTANCE ADMINISTRATION PROJECTS ONLY:**

a) Describe your agency's experience with administering a downpayment assistance program. Include information regarding the agency's experience with completing Residential Income Certifications and underwriting.

b) Is your agency a HUD-Certified Housing Counseling agency? *Please attach HUD-certification in the Documents section of the application.*

c) Is your agency able to offer bi-lingual services for processing downpayment assistance?

d) Does your agency also provide HUD-certified homebuyer education and counseling services?

e) Is your agency located in the City of Largo, within close proximity to Largo, or has the ability to meet clients at a local location for accessibility to services?

f) The City utilizes an online software for its housing programs:

Would your agency be willing to utilize the web-based housing software if provided access?

g) Does the agency have the capability to securely upload documents into the software (scanner, etc.)?

**HOUSING COUNSELING/EDUCATION SERVICES ONLY:**

a) Is your agency a HUD-Certified Housing Counseling Agency? *Upload a copy of the HUD certification in the Documents section of the application*

b) Are the staff that will be providing the housing counseling and/or education HUD-certified? *Upload a copy of the HUD Certification in the Documents section of the application.*

c) Select which types of classes/counseling services for which your agency is requesting funding (select all that apply):

- Financial Fitness/Budgeting *(required for the City's downpayment programs)*
- Homebuyer Education Class *(required for the City's downpayment programs)*
- Homebuyer Housing Counseling (one-on-one) *(required for the City's downpayment programs)*
- Rental Counseling: Provide housing counseling for delinquent renters and/or tenants facing eviction.
- Foreclosure Prevention Counseling

**d) Does your agency have all HUD requirements for the provision of homeownership counseling incorporated into its homebuyer education/housing counseling curriculum? (Deadline for compliance was January 14, 2017)**

**e) Describe the key components, format, and client follow-up used by your agency for the homebuyer education and/or housing counseling services requested in this application (describe each service separately if applying for more than one service):**

#### **HOMELESS SHELTER SERVICES ONLY**

*All homeless services applications should be focused on rapidly moving people into permanent housing (Housing First) and then wrapping supportive services around clients to help them successfully remain in permanent housing. Applications should also demonstrate how your agency has reduced barriers to access its services/programs.*

**a) Complete the Pinellas Homeless Leadership Board's [Housing First Survey](#) and upload it to the **F. Required Documents** section of this application.**

**b) Does your agency currently participate in the countywide Coordinated Entry System and enter client data into Pinellas Homeless Management Information System (PHMIS)?**

**c) Describe what steps, programs and/or methods will be used to prevent homelessness from recurring.**

**d) Using program data from PHMIS, provide data below on your agency's outcomes from the past PHMIS reporting year for the following:**

- Total number of unduplicated clients served and time period of data
- Average VI-SPDAT score of clients served
- % of clients that exited to permanent housing/supportive housing
- % of clients housed that returned to homelessness in 6 months (recidivism rate)
- Average length in program
- % of clients who gained income (earned or unearned) during the time they were enrolled in this program

**e) How will the funding requested to Largo be used to support maintaining/improving these outcomes?**

**f) Do your agency have priorities established to serve Pinellas County homeless residents or limitations on serving newer arrivals from outside the County?**

#### **CAPITAL IMPROVEMENTS PROJECTS ONLY**

**a) Provide a summary of the services provided/to be provided at this facility. Explain if the proposed improvements are limited to a certain service or all services provided at the facility.**

N/A

**b) Explain how the facility and programs based at the facility are geographically accessible to Largo residents. Include any accommodations made to improve accessibility, such as virtual options or in-home services as well.**

N/A

**c) Describe how the project meets the City's CDBG Goal: SUPPORTIVE SERVICES – Capital Improvements: Add, expand or improve public facilities that (will) provide supportive services predominantly to low- and moderate-income clientele/households/areas that will help Largo residents physically, mentally and economically thrive in Largo. Projects that improve energy efficiency to enable service providers to more effectively use their operating funds toward client services, and/or projects that harden such facilities to improve disaster resiliency would also be supported. Projects that add/expand of emergency shelter services for families with minor children experiencing literal homelessness would also be supported.**

N/A

**d) Disaster Hardening/Energy Efficiency**

**Does the project include any disaster hardening components or energy efficiency improvements? Please click all that apply below and explain.**

N/A

Disaster Hardening

Energy Efficiency Improvements

N/A- No Hardening or Energy Components Included in Project Scope

**e) Is the facility to be improved, expanded, or added located in Largo City Limits? Check the Property Appraiser website for the Tax Code. Tax Code is "LA" for Largo).**

No, the Property is not in City Limits or Planning Service Area

**Please Explain**

**f) Capital projects located in a Special Flood Hazard Area will not be funded under this funding cycle. Is the property located in a Special Flood Hazard Area? (Without Base Flood Elevation: Flood Zone A, V or A99; with Base Flood Elevation: Zone AE, AO, AH, VE, AR or in a Regulatory Floodway)?**

No, the project is not located in a Coast Flood Hazard Area

**g) Are there any known environmental hazards on the project area (ex. located in a Brownfield, located near to a landfill)?**

No Known Environmental Hazards on Project Site

**h) The agency must confirm with the jurisdiction that the property is located in that the proposed facility use is allowable. Written confirmation (email or letter/zoning letter) must be uploaded in the Required Document section of the application.**

## C. Timeline

**Case Id:** 25291

**Name:** Upwards, Inc - 2024/25

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**Address:** 5521 N University Drive Suite 104, Coral Springs,

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### C. Timeline

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Please provide the following information.

#### C.1 Project Timeline

**Provide an implementation schedule. Include all project phases. (In order to ensure that project costs are reimbursable, or are eligible for direct payment, no costs that the agency plans to bill to Largo CDBG should be incurred until the formal agreement has been made based on the City's grant award).**

**Please review the Application Instructions regarding timeline for more guidance.**

Phase	Beginning Date	Ending Date
Program/Services	07/01/2024	09/30/2025
Obtain Full Project Funding	M/d/yyyy	M/d/yyyy
Design/Scope of Work	M/d/yyyy	M/d/yyyy
Project Bid	M/d/yyyy	M/d/yyyy
Permitting	M/d/yyyy	M/d/yyyy
Construction	M/d/yyyy	M/d/yyyy

## D. Budget & Funding

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### D. Budget & Funding

Please provide the following information.

Public Services (Supportive Services) \* must have a minimum of \$10,000 in funding request.

Public Facility Capital Projects-\* must have a minimum of \$40,000 in funding request.

#### D.1. Project Budget

##### a) Include costs associated with this project (City Funds and Other Funding Sources)

Project Budget Line Item	Largo CDBG Funding	Other Funding Sources	Total Budget
Personnel Salaries	\$208,972.00	\$0.00	\$208,972.00
Fringe	\$3,114.00	\$0.00	\$3,114.00
Training Materials	\$0.00	\$19,142.00	\$19,142.00
Equipment	\$0.00	\$12,761.00	\$12,761.00
Marketing for Providers	\$0.00	\$15,393.00	\$15,393.00
Marketing for Program	\$0.00	\$3,190.00	\$3,190.00
Cost of Payments	\$0.00	\$14,783.00	\$14,783.00
Technology Cost	\$0.00	\$1,995.00	\$1,995.00
Administrative - Program	\$0.00	\$638.00	\$638.00
Grand Total	\$212,086.00	\$67,902.00	\$279,988.00

##### b) Will this project generate program income?

No

##### c) Select what basis for payment is being requested:

Direct Costs (reimbursement)

Please List Each Activity and Associated Fee for Service (or hourly fee per client)

Fee-for-Service	Service Name
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#### D.2. Funding Sources

a) List all funding sources to be used for the project. If other grant funds have/will be applied for, but the final allocation has not been determined, put these amounts in the "Funds Requested" column.

Funding Source(s)	Funds Requested	Funds Allocated
Largo CDBG Funding	\$212,086.00	\$212,086.00
Upwards Matching Contribution	\$67,902.00	\$67,902.00

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	\$279,988.00	\$279,988.00
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**b) If the grant request is not fully funded, will the project still be viable, even if on a smaller scale? (Please explain)**

Yes

**Explain:**

Yes, The BOOST program can be scaled up or down according to the decision of the governing body. Its operation is not dependent on full award funding and can be adjusted to the desired amount of coverage for the proposed area. If it were to be phased in or partially funded, an appropriate number of child care providers would be accepted into the program. Upwards already provides its services to childcare providers all over the country.

**c) Project costs are reimbursed by the City on a monthly/quarterly basis. For public services, project costs are reimbursed by the City on a monthly or quarterly basis. For public facilities projects, project costs are typically reimbursed at the end of the project or up to 3 reimbursements for larger projects. Does the agency have the financial capacity to pay for the portion of the cost funded by City grant during the project and be reimbursed on a monthly/quarterly basis for public services?**

Yes

**d) Please indicate the frequency your agency will be remitting invoices. If awarded funding, public services reporting will be set up on the same schedule (e.g. monthly invoices will have monthly reporting). Reporting for public facilities will be quarterly.**

Public Facilities- Up to 3 Invoices throughout the project (eligible if project exceeds \$50,000)

**D.3. Audit Requirements**

**a) Does your agency's current year budget, or next year's anticipated budget, include \$750,000 or more in federal funding revenue? *If yes, a single or program-specific audit must be conducted at the end of your agency's fiscal year.***

Yes

**b) Does your agency's current year budget, or next year's anticipated budget, include \$500,000 or more in state funding revenue? *If your agency is awarded SHIP funding and the answer to this question is "Yes", a single or program-specific audit must be conducted at the end of your agency's fiscal year.***

## E. Agency Information

Completed by [jessica.mckee@upwards.com](mailto:jessica.mckee@upwards.com) on 2/13/2024 3:28 PM

**Case Id:** 25291

**Name:** Upwards, Inc - 2024/25

**Address:** 5521 N University Drive Suite 104, Coral Springs,

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## E. Agency Information

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Please provide a brief summary (no more than 1-2 paragraphs on each of the following topics regarding the agency).

### E.1. Background/Program Experience (1-2 paragraphs only)

**Include the length of time the agency has been in operation, the date of incorporation, the purpose of the agency, and the type of corporation. Describe the type of services provided, the agency's capabilities, the number of clients served, and license to operate (if appropriate).**

Upwards is very familiar with different levels of government contracts, notably the compliance, monitoring, and reporting requirements at the state and federal levels. During the 2021-2022 program year, Upwards worked with Cathedral City, CA, as a sub-recipient of Community Development Block Grant (CDBG) funding to implement programs to benefit low-to-moderate income (LMI) clientele. These programs were BOOST (business support for daycare providers), CASE (childcare benefits for small enterprises), and Back2Work (tuition assistance for unemployed families seeking work). The total project budget amount for the first program year was \$275,690, and all programs were completed successfully. In summary, the BOOST program assisted 40 LMI daycare Providers and 232 LMI families, the CASE Program assisted 205 employers and 1,416 LMI families, and the Back2Work Program assisted 15 unemployed LMI parents. In total, Upwards assisted 1,703 LMI persons with the \$138,500 CDBG funds, equaling \$81.32/LMI person assisted.

Upwards is currently contracted with the State of California to administer childcare subsidies to income-eligible families. It is sponsored by General Child Care and Development (CCTR) expansion funds through the Child Care and Development Block Grant (CCDBG) for FY 2021-2022. Upwards was awarded \$2.065 million to provide direct tuition subsidies for children from birth to age three and school-aged children. Through its program WeeSubsidy, Upwards will enhance and expand quality infant and toddler services throughout California in areas experiencing significant shortages. The WeeSubsidy Program is set to provide support services and tuition reimbursement for childcare slots across high-priority zip codes in two major counties. The program supports and prioritizes high-need, low-income children and families that face higher risk factors for displacement or ad

### E.2. Personnel/Staff Capacity(1-2 paragraphs only)

**a) Briefly describe the agency's existing staff positions and qualifications, its capacity to carry out this project.**

Upwards will employ qualified and trained staff members with the credentials, experience, and knowledge to provide excellent care to children. All staff members and Upwards providers undergo comprehensive background checks and maintain appropriate certifications such as CPR and First Aid.

Additionally, Upwards provides licensing support to providers needing to expand or become licensed. For providers wishing to expand to a corporate center, there is a lot of hesitation around the potential financial burden and having to deal with other entities, such as insurance companies and the fire department, to ensure their center is up to code. Upwards can identify providers who are ready and willing to expand their licenses, and we have a dedicated support team to walk them through the entire process, helping to ease any doubts or fears they have about moving their licenses. Upwards's support team is well-versed in licensing requirements and can make suggestions for further resources and next steps.



**b) Does the agency have a personal policy manual?**

Yes

**c) Does the agency have an Affirmative Action Plan?**

Yes

**d) Does the agency have a Grievance procedure?**

Yes

**E.3. Financial Capacity (1-2 paragraphs only)**

**Attach a copy of the agency's current operating budget, including revenues and expenditures. Identify commitments for ongoing funding. Describe the agency's fiscal management, including financial reporting, record keeping, accounting systems, payment procedures and audit requirements.**

Upwards' Senior Finance Manager is responsible for the agency's accounting and will oversee the BOOST program's billing structure. The Senior Finance Manager's primary goal is to reduce errors and improper payments and remain in compliance with HUD's financial requirements.

**E.4. Monitoring (1-2 paragraphs only)**

**Briefly describe how you will monitor progress in implementing the program. Describe how funding and related project costs will be tracked separately in the agency and how the agency will ensure that expenses are not paid from duplicate sources. Describe who will be responsible for monitoring progress.**

BOOST will measure and track its participants' various demographic and population characteristics to ensure accurate reporting and to measure the program's effectiveness. Upwards will submit monthly and quarterly reports to the City of Largo to evaluate the success of the objectives and ensure the communities being served are those that need it most. Microenterprise participants are required to report their income and household size to determine their LMI eligibility. If reports indicate that the desired populations are not being reached and/or served, Upwards will adjust its outreach strategy to make the program more accessible and equitable to LMI providers and families in need.

BOOST thoroughly evaluates each daycare provider's business before, during, and after the program. Upwards is capable of capturing thousands of data points and will create thorough reports for the CDBG staff. The preliminary evaluation will be used as a baseline to compare a daycare's progress throughout the program. Demographic information collected upon intake includes income, household size, facility size, industry experience, certifications and level of education, race/ethnicity, and age. The Care Specialists who assist the daycare providers use a centralized database to observe local trends and will communicate with the providers through app push notifications, text, or by phone. This means they can verify that a daycare provider has successfully received, read, and comprehended the information. With real-time data and feedback, Care Specialists can make nimble adjustments as needed. BOOST will also obtain data via anonymous feedback surveys so participants, both childcare providers and families, can freely respond to questions about their experience. Family participants will have a similar pre and post-test collection of data that records income, employment, and frequency of childcare use. The key program indicators (KPIs) BOOST will use to determine the program's effectiveness will be measured continuously throughout the year. Upwards will submit monthly and quarterly reports to the City summarizing these qualitative and quantitative efforts and future projections.

**E.5. Insurance/Bonding/Worker's Compensation (1-2 paragraphs only)**

**State whether or not the agency has liability insurance coverage, in what amount, and with what insuring agency. State whether the agency pays all payroll taxes and worker's compensation as required by Federal and state laws. State whether or not the agency has fidelity bond coverage for principle staff who handle the agency's accounts, in what amount and with what insuring agency.**

Yes, see below.

Vouch: General Liability GL Amount: 5M

Vouch: Umbrella Amount: 3M

Vouch: Business Property Amount: 10K

WeeCare Insurance Broker: Hired & Non-Owned Auto Insurance Automobile Amount: 1M

WeeCare Insurance Broker: Sexual Misconduct Molestation Amount: 1M

WeeCare Insurance Broker: Error & Omission Technology E&O Amount: 2M

WeeCare Insurance Broker: Director and Officers Amount: 2M

WeeCare Insurance Broker: Cyber Liability Amount: 2M

Aon Risks of Florida: Workers Comp & Employment Liability: Amount: 2M

## F. Required Documents

Completed by [jessica.mckee@upwards.com](mailto:jessica.mckee@upwards.com) on 2/13/2024 3:28 PM

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## F. Required Documents

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Please provide the following information.

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### Documentation

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**Organizational Chart \*Required**

Org Chart.docx

**Board Resolution Authorizing Submittal of Funding Request \*Required**

WeeCareInc Board Resolution Exhibit A-1 (1).pdf

**Current Year Operating Budget \*Required**

Upwards Organizational Budget Explanation.pdf

**Most Recent Annual Independent Auditor's Report \*Required**

Upwards Independent Audit Explanation.pdf

**List of Board of Directors \*Required**

Upwards Board of Directors.pdf

**HUD Certificate - HUD-Approved Housing Counselors (if applicable)**

\*\*No files uploaded

**Housing First Checklist (if applicable)**

\*\*No files uploaded

HUD Certificate - HUD-Approved Housing Counseling Agency (if applicable),

*\*\*No files uploaded*

Informational pamphlets about the agency (Optional)

*\*\*No files uploaded*

501(c)3 Letter/Non-Profit Letter (if applicable)

*\*\*No files uploaded*

Other Documents

*\*\*No files uploaded*

## Submit

Completed by [jessica.mckee@upwards.com](mailto:jessica.mckee@upwards.com) on 2/13/2024 3:29 PM

**Case Id:** 25291

**Name:** Upwards, Inc - 2024/25

**Address:** 5521 N University Drive Suite 104, Coral Springs,

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## Submit

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I certify that I have been authorized by the applicant's governing body to submit this application and that the information contained herein is true and correct to the best of my knowledge.

### Authorized Name and Title

Jessica McKee

### Telephone

(805) 539-7848

### Authorized Signature

Jessica McKee

*Electronically signed by [jessica.mckee@upwards.com](mailto:jessica.mckee@upwards.com) on 2/13/2024 3:28 PM*

# IDIS Set Up

No data saved

**Case Id:** 25291

**Name:** Upwards, Inc - 2024/25

**Address:** 5521 N University Drive Suite 104, Coral Springs,

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## IDIS Set Up

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Please provide the following information.

**Activity Name**

**National Objective**

**Activity Number**

**National Objective Citation**

**Activity Description**

**HUD Matrix Code**

**Activity Type**

**HUD Matrix Citation**

**Service Area**

**Method Used for Determining LMI**

**Action Plan Project**

**Accomplishment Type**

**Completion Deadline**

**Eligibility Determination**

**Funds Requested**

\$0.00

**Eligibility Comments/Conditions**

**Funds Prop./Awarded**

\$0.00

**Housing Manager Signature**

*\*\*Not signed*

**Funding Source(s)**

**Approval Date**

**Is this project subject to Davis Bacon Act?**

**Is this project subject to Section 3?**

**Is this project subject to BABA Act?**

*Printed By: Sheera Greene on 2/15/2024*

**Explanation of BABA Act Determination Documentation:**

**BABA Act Documentation**

## Subrecipient Award

No data saved

**Case Id:** 25291

**Name:** Upwards, Inc - 2024/25

**Address:** 5521 N University Drive Suite 104, Coral Springs,

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## Subrecipient Award

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Please provide the following information.

### Award Letter

Award Letter

*\*\*No files uploaded*

### Subrecipient Agreement

Subrecipient Agreement

*\*\*No files uploaded*

### Purchase Order

Purchase Order

*\*\*No files uploaded*

### Purchase Order Number

### Changer Order PO (if applicable)



# LURA/Equity Sharing

No data saved

**Case Id:** 25291

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## LURA/Equity Sharing

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Please provide the following information.

**L.1 LURA/Equity Sharing Start Date**

**L.2 LURA/Equity Sharing End Date**

**L.3 LURA Comments/Notes**

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## Documentation

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**Land Use Restriction Agreement**

*\*\*No files uploaded*