

## UCF Edu-Fund Platform

**Funding initiative for multidimensional programmes aimed at contrasting educational poverty**

### 1. UNICREDIT FOUNDATION

UniCredit Foundation is the corporate foundation of UniCredit Group whose purpose is to unlock the potential of Europe's next generation. Its mission is to **empower young people across Europe by creating equal opportunities in education** and to support them in making their way in life and the professional world. The Foundation's initiatives aim at **combating school drop-out, enhancing employability, encouraging university attainment and promoting study and research**. The Foundation is committed to supporting communities in all countries where UniCredit Group operates.

### 2. "UCF EDU-FUND PLATFORM"

The UniCredit Foundation is taking a significant step forward in its mission by launching the **"UCF Edu-Fund Platform"**. This initiative is a testament to the Foundation's commitment to providing youth with equal opportunities for quality education and addressing the widespread and multifaceted issues of early school leaving and inadequate skills for university studies or job market entry. The "UCF Edu-Fund Platform" is a **bold move to support programs focused on combating educational poverty, particularly among lower and upper secondary school students aged 11-19**.

With a **multidimensional approach**, it is designed to support those initiatives that help address those peripheral issues that have a direct impact on the educational challenges faced by young people across the countries where UniCredit operates. The platform – with a substantial **funding pool of up to €14 million** – will remain open all year round, offering **three streams of funding opportunities**, ranging from €100,000 to over €1 million, to cater to a range of program scales. These streams are designed to engage a diverse array of entities committed to fostering quality education and regional development, ensuring a comprehensive and inclusive response to the educational needs of the community.

The initiative extends to Austria, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Germany, Hungary, Italy, Romania, Serbia, Slovakia, and Slovenia and it is open to non-profit organisations with in-depth knowledge of educational needs. The platform's eligibility criteria ensure that the supported programs are well-defined, capable of delivering tangible social impact, and sustainable over time.

### 3. OBJECTIVES, TARGET ORGANIZATIONS AND GEOGRAPHIC AREAS

The "UCF Edu-Fund Platform" will remain open all year-round (or until funds are available) – to support bold programmes to combat educational poverty that preferably adopt a multidimensional approach by involving key community stakeholders.

#### 3.1 Objectives

Programmes aimed at addressing educational poverty in favour of lower and upper secondary school students (11-19 age), with a particular focus on:

- addressing early school drop-out
- training teachers
- encouraging university attainment
- enhancing employability for students, through the acquisition of adequate skills to enter the job market

### 3.2 Target organizations

Programmes carried out by **non-profit organisations**<sup>1</sup> operating locally or cross-country with substantial knowledge and presence in one or more countries mentioned in point 3.3.

### 3.3 Geographic Areas

Programmes implemented in the following countries: **Austria, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Germany, Hungary, Italy, Romania, Serbia, Slovakia, and Slovenia.**

## 4. FUNDING STREAMS

The “UCF Edu-Fund Platform” envisages **three streams based on the type and size of the proposed programmes**. These streams share common objectives, targets, and areas of intervention as outlined in point 3. The applications should align with these streams according to the following criteria:

### 4.1 Stream 1 – Small-scale programmes

<b>Scope</b>	Local programmes (in one country among those listed under 3.3)
<b>Duration</b>	18-24 months
<b>Funding</b>	Between €100k-€300k
<b>Description</b>	Small-scale programmes that can make a significant impact within a more localized area. These programmes should be tailored to meet the specific needs of their communities, with clear objectives and measurable outcomes

### 4.2 Stream 2 – Mid-scale programmes

<b>Scope</b>	National and local programmes (one country among those listed under 3.3)
<b>Duration</b>	24-36 months
<b>Funding</b>	Between €300k-€800k
<b>Description</b>	Robust programmes addressing key issues at the national <sup>2</sup> and local <sup>3</sup> level within UniCredit countries. Programmes should be well-defined and capable of delivering measurable results within their targeted communities

### 4.3 Stream 3 – Large-scale programmes

<b>Scope</b>	Multi-country (a minimum of two countries among those listed under 3.3) or national wide programmes
<b>Duration</b>	24-36 months (longer programmes may be considered)
<b>Funding</b>	€800k or more
<b>Description</b>	Wide-reaching programmes that have the potential to create significant and measurable impact across multiple countries or at the national level. Programmes in this category should demonstrate a strong strategic approach and have the capacity for large-scale implementation and sustainability

<sup>1</sup>**For Italy only:** applicants must be “Enti del Terzo Settore (ETS) listed on RUNTS as defined by art.4 of Legislative Decree n. 117/2017”.

<sup>2</sup>Programmes implemented in multiple regions and/or areas of the same country

<sup>3</sup>Programmes implemented only in specific regions and/or areas of the same country

## 5. ELIGIBILITY CRITERIA

To be eligible, applicants must:

### 5.1 Respect the following requirements:

- Be non-profit organizations<sup>4</sup> with a presence (e.g. headquarters, representative office, branch/branches, correspondents, etc.) in one of the countries listed section under 3.3. Public administrations, political parties and movements, trade unions, professional and representative associations of economic categories, employers' associations, and entities under the direction, coordination, or control of these bodies are not eligible
- Have been established for at least two years and possess a solid financial structure (UniCredit Foundation will verify the validity of the documents uploaded to the platform and reserves the right to request further information)
- Demonstrate in-depth knowledge of the educational needs to be addressed and of the territory in which the programme is to be implemented
- Submit a maximum of one application per stream: multiple applications by the same applicant for the same stream will not be considered

It is possible to submit one application for each stream: all applications will be assessed, but only one can be funded.

### 5.2 Propose programmes that:

- Generate tangible and monitorable social impact in combating educational poverty
- Provide coherent objectives and intervention strategy as well as effective (financial and human) resource planning, time management and monitoring of activities
- Based on the objectives outlined for the programme, identify relevant context data, define KPIs, set targets and guidelines for measuring programme outcomes (including source of data verification)
- Should the programme be already running, propose a plan for scaling or expanding it (e.g. to a larger number of schools/students in the same country/region; to other geographic areas (as indicated in 3.3) where similar educational needs were identified)
- Provide a detailed budget including monitoring and impact evaluation as well as communication expenses.

The following activities are **ineligible** for funding if not directly related to the proposed programme: purchasing land and/or acquiring immovable property; building construction; ordinary activities (e.g. the expenses relating to the management and maintenance activities necessary to guarantee the daily, ordinary activity, such as payment of salaries, rent of premises, purchase of materials of ordinary administration, etc.); granting scholarships; organizing events, conferences, or exhibitions.

## 6. REQUIRED DOCUMENTATION

After completing the application form, the following documents must be uploaded to the platform:

- Statute

---

<sup>4</sup> The proposal for a multi-partner program must identify a single applicant

- 2022 and 2023 Financial Statements
- 2023 Annual Report
- Child Safeguarding Policy (or other set of policies, procedures and practices employed to actively prevent children harm, abuse and distress)
- Programme Tracking tool (form available on the platform)
- Programme Budget (form available on the platform)
- Anti-Corruption declaration signed by the legal representative of the organization (form available on the platform)

To guarantee that all the eligibility criteria and requirements listed in points 5. and 6. are met, UniCredit Foundation may engage, where necessary, the relevant departments of UniCredit S.p.A.

## 7. EVALUATION CRITERIA

The evaluation of the proposed programmes will be based on a set of predefined criteria, with each criterion assigned a weight (see Table 1).

**Table 1 – Evaluation criteria**

CRITERIA	WEIGHT (%)
<b>Experience and competence of the proposing non-profit organization:</b> this criterion refers to the applicant's profile, focusing on their expertise in the non-profit sector, particularly in the education field relevant to the target beneficiaries. Evaluation will consider years of experience, knowledge of the territory and its needs, as well as the track record and results of past programmes.	<b>25</b>
<b>Coherence and content of the action plan, methodology and approach, monitoring and reporting tools:</b> these criteria refer to the clarity and depth of each action's content, ensuring consistency with the respective objectives, <b>qualitative characteristics</b> (as indicated below), and expected results, as well as an appropriate output and outcome impact evaluation.	<b>50</b>
<b>Cost-efficiency of the proposal and sustainability over time:</b> the cost-efficiency of the proposal means whether the costs of the proposed action are adequate to the activities and proportionate to the expected results, referring also to the overall organization budget. The programme must also be sustainable (in terms of economic sustainability, continuity, and stability of the programme over time) beyond the grant period and financial means are envisaged to pursue the action.	<b>25</b>

Preference may be given to eligible organizations fulfilling the following **qualitative characteristics**:

- **Best practice:** the proposed programme is based on a validated and/or certified model/approach
- **Multidimensional and community-centric approach:** the programme adopts a multidimensional strategy where teaching and learning remain the focus, while complementary interventions are implemented with the support of the key community stakeholders

- **Innovation:** the proposed programme includes elements of innovation in terms of intervention model, approaches, methodologies, or technologies, as well as original, creative, and effective solutions
- **Opportunity for scaling and/or expansion:** the programme is realistically scalable to other cities, towns, or regions within the same country and/or the programme is realistically replicable in other countries where UniCredit operates, with similar educational needs, or can be expanded in scope – provided that the applicant has the possibility and the willingness to do so

## **8. APPLICATION PROCEDURE AND EVALUATION PROCESS**

Applications will only be accepted through the [“UCF Edu-Fund Platform”](#) tool and must be written in English.

The application window is open continuously starting from July 22<sup>th</sup>, 2024 to April 30<sup>th</sup>, 2025, or until available funds are exhausted. This means that applications are continually accepted and reviewed at specific intake periods.

The evaluation process will be conducted by a Committee that will perform comprehensive assessment of the applications based on the criteria outlined in point 7. The evaluation sessions will be scheduled on a quarterly basis starting October 2024.

Only applications with a total score equal or exceeding 70% will be deemed eligible for consideration.

The Evaluation Committee will be composed of international members with different background (non-profit, academia, civil society, business) each with proven expertise in the field of education.

At the conclusion of each evaluation process for the three streams, all applicants will be notified of the results. Timing for notification may change depending on the number of applications received. Updates and timing of the evaluation process will be communicated via the [UniCredit Foundation website](#).

The evaluation of the applications and any subsequent awards of funding will be made entirely at the discretion of the Evaluation Committee, with full authority vested in the Committee regarding these matters. Moreover, the Foundation reserves the right not to allocate the entire funding, or any part of it, if it deems the submitted proposals to be inadequate and/or undeserving, even partially.

## **9. AGREEMENT AND REPORTING PROCEDURES**

UniCredit Foundation and the awarded organizations will enter into a donation Agreement. In accordance with the Agreement, the selected entities will receive a contribution disbursed in instalments. The terms and timeline of these disbursements will be jointly determined by the UniCredit Foundation and the organization during the finalization of the Agreement.

The Agreement will also outline the reporting schedule, which will include periodic narrative and quantitative reports on the programme progress towards targets indicated in the application. Upon programme completion, a budget review will be required.

## **10. OBLIGATIONS AND CONTACTS**

Submission to the Edu-platform form implies the complete and unconditional acceptance of these Terms and Conditions.

Further information and clarifications may be requested to: [info@unicreditfoundation.org](mailto:info@unicreditfoundation.org)