

Sigrid Lundby

President of United Benevolent Association

Since 1831 UBA (Union Benevolent Association) has provided critical funding and support to organizations that assist and enrich the lives of vulnerable and disadvantaged Philadelphians. Our focus is in basic needs which can be broadly defined as food, clothing, shelter and essential social services. Historically we had two grant cycles, Spring and Fall. We would award over 100 small grants (ranging from \$100 - \$2,000) annually. Over the years we learned that while some organizations or programs can benefit from smaller grants, many need greater funding. To be more impactful, we increased the amount that can be requested to \$10,000 which reduced the number of organizations we are able to support.

Our goal and commitment to our community is to be as impactful as possible within the confines of our corpus. While 5% is the minimum we must distribute we typically go over that range to closer to 10%. We eliminated any restrictions on the grants whereby funds can be used for general operating purposes. In addition to our Spring and Fall grant cycle we implemented an annual Special Grant of \$20,000. As a Board we talk about where we can make an impact e.g., Immigration, Incarceration and Housing for Hurricane relief. The Special Grant has been "by invitation to apply". Because of the impact Covid-19 we took an additional step in 2021, to distribute an additional \$100,000 or \$25,000 to four organizations (CEIBA, AFRICOM (The Coalition of African and Caribbean Communities), The Peoples Emergency Center and PCDC (The Philadelphia Chinatown Development Corporations).

Today, we have two types of grants: General Grant in the Spring. The applicant must demonstrate the ability to contribute to alleviating poverty in Philadelphia. The maximum request considered is \$10,00 and no more than 25% of the organizations budget. In addition, we have a Multi-Year Targeted Grant(s) in the Fall. The focus is to provide support on a community/neighborhood. The area(s) of focus is at the annual discretion of the board and is announced during the application cycle. The Two-year grant request is a maximum of \$40,000 and no more than 25% of the organizations budget.

The Trustees or Board Members all serve as members of the Allocations Committee in that we review the proposals, then discuss and determine which organizations we will support. Sigrid is the current Board President. Her 30+ year career was in wealth management where she managed investments for high-net-worth individuals, charities, and foundations. In addition, she served as Chair for the BNY Mellon Mid-Atlantic Charitable Trust.