



## **SECTION 1: NEW for 2018-2019**

### **Application Format**

The application is now in a fillable PDF format. If you do not have a PDF reader, you can download Adobe Acrobat for free at <https://get.adobe.com/reader/>. You will be able to save your application as a PDF document, submit electronically and print a copy in this form. Please be aware that formatting from other programs (ex. word documents) may not transfer into the application if you choose to copy and paste and some questions have limitations regarding word count.

### **Project Logic Model (Program/Project Application only)**

The layout of the Project Logic Model in the Program/Project Funding Application has changed from prior applications. Please use the logic model to explain the planned components needed for the program/project to achieve the desired outputs. Additionally, outline the short term and long term outcomes and impacts of the program/project. A sample Project Logic Model has been included in Appendix A at the end of the Applicant Guide.

## **SECTION 2: Application Requirements**

- Any registered charity that demonstrates impact in one or more of the United Way Strategic Focus Areas may apply to the Community Fund ([United Way CSO Community Impact Strategy](#)). However, we strongly recommend that organizations build a relationship with United Way prior to applying for funding. If you have not received funding in the previous year or have substantially changed your request from the prior year, you must declare your intention to apply by email to [reanne@unitedwaycso.com](mailto:reanne@unitedwaycso.com) no later than Friday March 23, 2018.
- Applicants must choose one application to complete, either Program/Project or Core Operational. **\*Note:** if you are applying for less than \$5,000 (for either Core Operational or Program/Project) please complete the Community Fund Application Short Form.
- Applications must include all items listed on the Applicant Checklist (Appendix B at the end of this Applicant Guide)
  - ✓ 1 electronic AND 1 printed copy of the completed Community Fund Application  
*\*Note: Only one application copy required for Community Fund Application Short Form applicants*
  - ✓ List of current board members
  - ✓ Most recent audited (or professionally prepared) financial statements
  - ✓ Marketing attachment
  - ✓ Most recent Annual Report

See **Section 4: Frequently Asked Questions** for additional information regarding the application.

Should you have further questions regarding the Community Fund or if you would like to set up a meeting or phone discussion regarding the application process, please contact: Reanne Amadio, Manager of Community Investment at 250-860-2356 or [reanne@unitedwaycso.com](mailto:reanne@unitedwaycso.com)

## SECTION 3: Submitting Your Application

**Submissions must be received at our Kelowna Office by 5:00PM on Friday April 6<sup>th</sup>, 2018.** Requests can be submitted by email, mail or dropped off during office hours. Late or incomplete applications will not be considered.

Applications are to be submitted to:

United Way CSO  
Community Investment Committee  
#202-1456 St. Paul Street  
Kelowna, BC V1Y 2E6

Phone: 250-860-2356

Email: [reanne@unitedwaycso.com](mailto:reanne@unitedwaycso.com)

## SECTION 4: Frequently Asked Questions

### Who can apply to the United Way Community Fund?

Any registered charity that demonstrates impact in one or more of the United Way Strategic Focus Areas may apply to the Community Fund ([United Way CSO Community Impact Strategy](#)). However, we strongly recommend that organizations build a relationship with United Way prior to applying for funding. Partnering with United Way includes helping to generate resources and awareness for the community in order to support positive change. For more information on this, please contact the Manager of Community Investment.

### Are there any extra steps to take if I am a new applicant?

Yes. Organizations that did not receive funding in the previous year must declare their intention to apply to the Community Fund no later than Friday March 23, 2018 by sending an email to [reanne@unitedwaycso.com](mailto:reanne@unitedwaycso.com) with "Intention to Apply" in the subject line and a note stating the purpose(s) for which you are requesting funding.

### What are the United Way's Strategic Focus Areas?

- 1) From Poverty to Possibility: Meet basic human needs and move people out of poverty by supporting housing stability, employment & financial security, and food security.
- 2) All that Kids Can Be: Help children and youth reach their full potential by supporting early learning, healthy kids, and resilient youth.
- 3) Healthy People, Strong Communities: Support personal well-being and strengthen neighbourhoods by investing in mental wellness, personal health & safety, and community connectedness.

It is recommended that all applicants review the Community Impact Strategy prior to completing their application and ensure they articulate in their application how their funding request demonstrates impact in one of more of the United Way Strategic Focus Areas ([United Way CSO Community Impact Strategy](#)).

### How much funding can I request in my application?

There is no set minimum or maximum amount of funding. However, the Community Investment Fund is a competitive process and no organization should assume they will receive funding even if they have in past grant cycles. Organizations are asked to fully explain the amount of funding requested in their application.

If you are requesting an increase, please explain why more funds are needed, how they will be utilized and the impact this will have for people in the community. Please note that the United Way may be unable to grant all

funding requests for proposed dollar amounts. Larger organizations are typically encouraged to apply for funding for a specific program/project.

If you plan to apply for less than \$5,000 in total, please complete the Community Fund Application Short Form.

### **What types of funding are available through the Community Fund?**

Two types of funding are available from the Community Fund, Program/Project Funding and Core Operational Funding. There is a separate application form for each type. An organization may not apply for both, please choose one funding type and complete that application only.

Program/Project Funding: Supporting expenses related to a specific program or project. You may apply for funding for more than one program or project, and if you do please include Program/Project Application Section 2 Appendix A for each additional program/project.

Core Operational Funding: Funding towards administrative salaries or wages, site expenses such as rent or utilities, insurance, organization promotion expenses.

### **What are the terms of funding?**

- 1) Payment schedules and funding period dates are reviewed annually and may vary from year to year. Previously, first payments have been distributed in the fall.
- 2) Agencies are required to submit a report 6 months after the first payment is received. Failure to do so could jeopardize future funding requests.
- 3) United Way receives many applications for funding each year, and it is not possible to grant every request. We invest in strong, stable organizations and programs that are most likely to achieve impact within our Strategic Focus Areas. Applications to the Community Fund are thoroughly assessed by staff and volunteer Impact Teams made up of community representatives, using the following criteria:
  - a. Application must be complete.
  - b. Application must be submitted on time.
  - c. Applicant is a Registered Charity in good standing with the Canada Revenue Agency.
  - d. Previous United Way investments have produced intended results and reporting is up to date (if funded in the previous year).
  - e. Application strongly aligns with a United Way Strategic Focus Area and articulates a solid strategy for doing so.
  - f. Application demonstrates both the need and the positive impact of the organization and/or program/project within the community.
  - g. Proposed activities/programs/services do not duplicate other work that is being done in the community.
  - h. Applicant organization demonstrates solid governance, administrative practices and financial management.
  - i. Applicant organization is an active partner in the United Way movement and promotes itself as such. New applicants must be actively working to become involved in the United Way movement.
- 4) If an applicant organization is approved for funding, that funding is contingent upon:
  - a. Funds being used for their intended purpose as specified in the funding request.
  - b. Adherence with the United Way Memorandum of Understanding.
  - c. Registered charitable status remaining in good standing.
  - d. Organization maintaining a respectable reputation in the community.
  - e. Availability of funds generated by the United Way campaign. In the event of a lack of available funds, the amount provisionally allocated to future payments may be adjusted to reflect the dollars available for distribution.

## Do you have suggestions or tips for submitting a strong application?

- 1) Be specific about how the requested funds will be spent and how they align with the United Way Strategic Focus Areas. If you are asking for an increase from last year, explain why more funds are needed and how they will make an impact for people in community. While there is no maximum amount that you can request, United Way may be unable to grant all funding requests for proposed dollar amounts.
- 2) Explain how you know the need exists and how the requested funding will improve lives and impact communities. A good case for support is critical to grant-writing success.
- 3) Do not use acronyms in your application.
- 4) Do not copy and paste your entire application from last year. Even if your funding request is similar, your application and interview should demonstrate that your organization is making progress toward its mission and goals. It is important to articulate how things have changed or evolved since your previous funding request.
- 5) If you received feedback from United Way last year, you should be able to demonstrate that feedback has been implemented or taken into consideration and/or that change has resulted.
- 6) Share how previous support from the United Way made a difference to your organization's ability to carry out its mission, and how your agency has acknowledged this support.
- 7) Ask an external source to review your proposal – they will see things that you may have missed.
- 8) Actively participate in the United Way movement by helping to raise funds and awareness in accordance with the United Way mission. Examples include, but are not limited to, being part of workplace campaign presentations, participating in United Way events and/or initiatives, etc.
- 9) Do not submit your application late or incomplete. It is best not to leave your application to the last minute. Plan ahead to obtain requirements such as board signatures.

## What happens after we submit our Community Fund application?

### Step 1: Application Review

United Way staff will review your application to ensure it is eligible and complete, and follow up with any questions or items for clarification.

### Step 2: Impact Team Assignment

If your application is eligible for further consideration, an Impact Team will be assigned to your organization. Impact Teams are made up of 2-3 trained community volunteers who review funding applications, interview their assigned applicant agencies, and make funding recommendations to the United Way Community Investment Committee and Board of Directors.

### Step 3: Impact Team Interview

An Impact Team leader will contact you to schedule an interview. Interviews will occur in April or May. Each interview will last roughly an hour and may involve a tour of your organization. In order to adequately prepare, you will be provided with the interview topics ahead of time. Organizations should plan to have their Executive Director/Senior Administrator, minimum of 1 Board Member, and any other relevant staff or volunteers present for the interview. This allows for multiple organizational perspectives on each funding request. It is **critical** to have a team member who can answer financial questions about your organization present for the interview.

### Step 4: Notice of Funding Decision

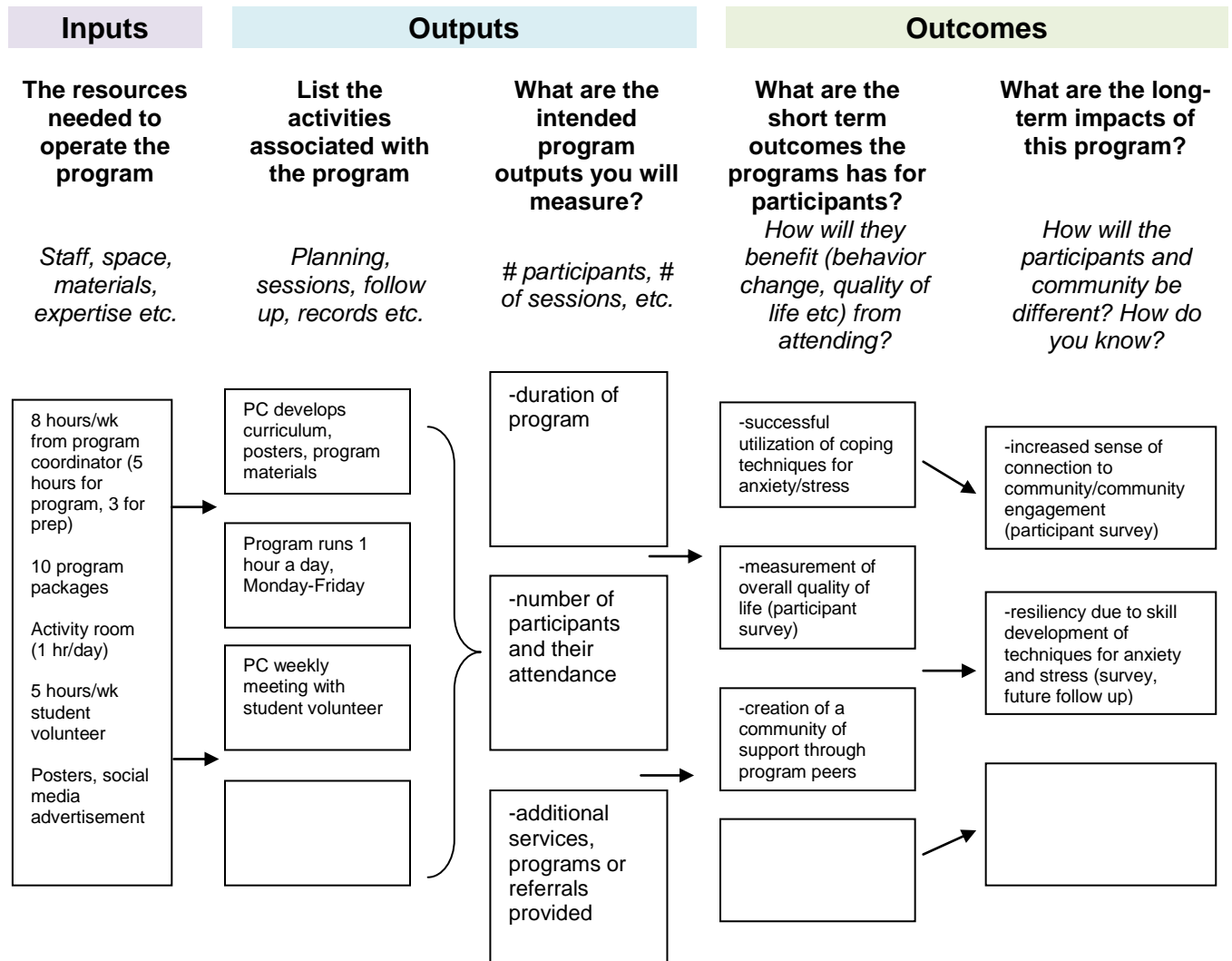
Once the Impact Teams' funding recommendations have received approval from the United Way Board of Directors, you will be informed in writing of the funding decision. Your organization will also receive written feedback on your application and interview.

## **SECTION 5: Contact Us**

To obtain more information about funding opportunities or to ask questions regarding the Community Fund Application process, please contact Reanne Amadio to set up a meeting or phone discussion.

Reanne Amadio  
Manager, Community Investment  
Phone: 250-860-2356  
Email: [reanne@unitedwaycso.com](mailto:reanne@unitedwaycso.com)

## APPENDIX A: Project Logic Model Example



## APPENDIX B: Applicant Checklist

### Option 1

#### Community Fund Application (applying for \$5,000 or greater):

- Core Operational or Program/Project Application

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|  | <b>ONE electronic</b> copy of a complete application package<br>-Please email to <a href="mailto:reanne@unitedwaycso.com">reanne@unitedwaycso.com</a>                             |
|  | <b>ONE signed paper</b> copy<br>-Do not use any special bindings or folders.<br>-Paper or binder clips are preferred over staples.<br>-Please deliver to 202-1456 St. Paul Street |
|  | Current Board Members list<br>-Including their occupations and contact information.<br><i>*Please include in both electronic and paper copies of your application.</i>            |
|  | Your organization's most recent audited, or professionally prepared, financial statements.<br><i>*Please include in both electronic and paper copies of your application.</i>     |
|  | A completed Marketing Attachment.<br><i>*Please include in both electronic and paper copies of your application.</i>  |
|  | A copy of your organization's most recent Annual Report, if available.<br><i>*Please include in both electronic and paper copies of your application.</i>                         |

### Option 2

#### Community Fund Application Short Form (applying for less than \$5,000):

- Only 1 copy of each document is required for short form applications.
- You may submit your application electronically or deliver a paper copy.

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|  | <b>ONE</b> copy of a completed application package (electronic <b>or</b> paper copy)<br>-Please email to <a href="mailto:reanne@unitedwaycso.com">reanne@unitedwaycso.com</a> or deliver to 202-1456 St. Paul Street |
|  | Current Board Members list<br>-Including their occupations and contact information.  |
|  | Your organization's most recent audited, or professionally prepared, financial statements.   |
|  | A completed Marketing Attachment.  |
|  | A copy of your organization's most recent Annual Report, if available.   |