United Way of Southern Interior BC (UWSIBC) has a mission to serve the needs of our local community and ignite the desire in everyone to improve this community we call home. One of the ways that UWSIBC carries out this mission is by funding programs and projects that make measurable, lasting change.

The Community Fund is the central program through which UWSIBC offers funding to the community annually.

If your organization is interested in applying for a Community Fund grant, **please carefully read through this Applicants' Guide in its entirety before completing the Application Form.** The Applicants' Guide takes you through all the steps and important information required for a submission to the Community Fund.

If you have any questions after reading the Applicants' Guide, please contact:

> **Sherry Ferronato**, Director of Community Investment & Wellness
> sherry@unitedwaysibc.com
> 403-975-5466

Step 1: Determine if your organization is eligible

To be eligible to apply for a Community Fund grant, your organization must:

☐ Be a Registered Charity, in good standing with Canada Revenue Agency (CRA)
☐ Have submitted all required reporting on previous UWSIBC grants
☐ Exhibit strong governance, administrative practices and financial management

Please note that your organization may submit an application as a "Charitable Sponsor," on behalf of a partnership, collaboration or non-charity (e.g., a non-profit organization). Under CRA guidelines, acting as a charitable sponsor requires that your organization must monitor, regulate and control the funds, and retain direction and control of the charitable funds. Also, the activities of the non-charity must align with your mandate and contribute to the achievement of that mandate.

Step 2: Determine if your initiative is eligible

To be eligible to apply for a Community Fund grant, the initiative for which you are seeking funding must:

☐ Align with and demonstrate measurable impact in one or more of UWSIBC's priority areas, as described below:

> **A. Poverty**
> **Objective:** We help move people from poverty to possibility.
> **What we fund community organizations to do:** To deliver programs that reduce vulnerability to poverty, help elevate people out of poverty, and meet basic needs such as food, shelter and employment.
> **Examples of potential funded initiatives:**
> - Food security initiatives
> - Housing stability programs
> - Literacy and foundational learning programs
> - Employment supports
> - Financial empowerment initiatives

B. **Children & Youth**
   Objective: We help children and youth reach their full potential.
   What we fund community organizations to do: To deliver programs that support young people's social, mental and physical health, and help them be all they can be.
   Examples of potential funded initiatives:
   - Early childhood development and learning programs
   - Out-of-school-time programs
   - Youth resiliency programs such as mentoring, employment and leadership initiatives
   - Programs for exploited and vulnerable youth
   - Initiatives that assist young people to transition into adulthood
   - Parenting supports

C. **Mental Health & Addictions**
   Objective: We support efforts to reduce social isolation and encourage mental health.
   What we fund community organizations to do: To deliver programs that create more inclusive communities, promote mental health, and ensure those impacted by mental health issues and addictions can easily access the supports they need.
   Examples of potential funded initiatives:
   - Education initiatives that focus on mental health awareness, assisting those affected by a mental health or addiction concern, developing coping skills and resourcefulness
   - Prevention focused programs that provide opportunities to build inclusion, belonging, and social connection
   - Support groups that build community and social supports
   - Counselling programs
   - Treatment and recovery programs

D. **Capacity Building**
   Objective: We encourage efforts that strengthen the ability of community organizations and the social sector to do their work better, to improve their sustainability, and to thrive.
   What we fund community organizations to do: We fund projects that enable community organizations working in our priority areas to improve their infrastructure and operations, increase their longer-term sustainability, and serve the community better. We also provide core operational funding where the funded expenses strengthen the organization's longer-term resilience.
   Examples of potential funded initiatives:
   - Organizational effectiveness initiatives in foundational areas (e.g., governance, HR, technology, financial management, resource development, communications, planning, evaluation, etc.)
   - Transformation (e.g., equity, diversity & inclusion audit, Truth & Reconciliation initiative, etc.)
   - Restructuring (e.g., collaborations, partnerships, mergers, right-sizing, etc.)
   - Resilience (e.g., core funding to cover key operational costs (including salaries) until other revenue sources are fully developed and implemented, changes required to effectively operate in a COVID environment, sustainability plans and initiatives, etc.)
   - Sector strengthening initiatives (e.g., volunteer management, board development, leadership training, data sharing, programs that strengthen multiple community organizations, etc.)

- ☐ Address a proven community and/or organizational need(s), and demonstrate a solid strategy for addressing the need(s)
- ☐ Have measurable traction and proven successful impact/outcomes (i.e., funding will not be provided for pilot programs)
- ☐ NOT duplicate other work being done in the community
- ☐ Request a grant of between $5,000 - $25,000.Organizations applying for funding for initiatives that provide services in multiple regions within Southern Interior BC may apply for up to a maximum of $40,000.
- ☐ Request funding for activities and expenses occurring between September 1, 2021 and September 31, 2022 (i.e., requests for retroactive and deficit funding will not be accepted)
- ☐ NOT be a capital grant request

Step 3: Determine if your organization can meet the funding agreement terms

If your application is approved for funding, your organization will have to sign and fulfill a funding agreement that requires such terms as:

- Funds being used for their intended purpose as specified in the funding request
- Registered charitable status remaining in good standing
- Organization maintaining a respectable reputation in the community
- Submitting a progress report 6 months after the first payment is received
- Organization being an active partner in the United Way movement and promoting itself as such, and helping to generate resources and awareness for the community
- Acknowledgement that the grant is dependent upon the 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.

Step 4: Complete the Application Form

How to apply:

- Download the Community Fund Application Form from the UWSIBC website, at https://unitedwaysibc.com/community-fund/
- Complete the Application Form. The Application Form is a fillable PDF form. If you do not have a PDF reader, you can download Adobe Acrobat free at https://get.adobe.com/reader/. Please be aware that formatting from other programs (e.g., Word documents) might not transfer into the Application if you choose to copy and paste, and some questions may have limitations regarding word count
- Ensure the Application Form has been signed electronically (or sign manually and scanned)
- Save your application as a PDF document

Suggestions for strong application:

- Be specific about how the requested funds will be spent and how they align with the United Way Strategic Priorities
- 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
- Do not use acronyms in your application
- Do not assume that the Community Impact Team reviewing your application is familiar with funding that you have received or requested from UWSIBC in the past. Provide sufficient background on your organization and initiative to ensure the reviewers understand your context
- Ask an external source to review your proposal – they will see things that you may have missed
- Submit your application on time. It is best not to leave your application to the last minute. Plan ahead to obtain requirements such as board signatures

Step 5: Gather additional required documents

In addition to the completed Application Form, you must submit the following documents electronically as part of your application:

- Current Board Members list, including their occupations and contact information
- Your organization's most recent audited, or professionally prepared, financial statements
- A copy of your organization's most recent Annual Report, if available

Step 6: Submit application package

Submit the completed, signed Application Form, together with the Board Members list, financial statements and Annual Report (if available) **by Monday, May 31 at 4:30 pm** to:

> **Sherry Ferronato**
> **sherry@unitedwaysibc.com**

Late applications will not be accepted.

Step 7: Application review, recommendation and decision

- Staff do an initial review of your application, and may contact you with any preliminary questions or missing items
- Staff assign your application to one of four "Community Impact Teams," each of which focuses on one of UWSIBC's priority areas. Each Community Impact Team consists of 3-4 trained volunteers who come from a variety of backgrounds and geographical regions
- Community Impact Team members review your application.
- If the Community Impact Team requires further clarification on your initiative, a Zoom meeting with your organization is set up, so the Team can ask their questions and learn more about your project
- The Community Impact Team meets to discuss all the applications assigned to them, and develops recommendations based on their reviews and discussions
- All Community Impact Teams meet together as the Community Investment Committee, to consider all four Teams' recommendations and develop the final overall recommendations for Community Fund grants
- UWSIBC's volunteer Board of Directors considers the Community Investment Team's recommendations, and makes the final allocation decisions

Step 8: Notification

Your organization will be notified of the outcome of your application in August 2021. You will be informed of the funding decision in writing, via email.

Step 9: If approved for funding, provide required documentation & marketing support

If your funding request is approved, you will be required to provide the following documentation:

- A signed electronic copy of the United Way Memorandum of Understanding (a funding agreement)
- Your organization's banking information to enable UWSIBC to electronic transfer funds to your organization's account. Grants are typically paid out quarterly (October, January, April and July), but this may vary depending on the size and nature of the grant
- 6 months after receiving funding, a 6 Month Report to provide information on the progress of your initiative

UWSIBC generates support from the community (raising funds, recruiting volunteers, leveraging knowledge and skill sets) in collaboration with our funded partners. Your participation in the United Way campaign and the stories and examples you share with us are essential to raising funds and support in the community. If your organization receives funding, your organization will be asked to provide marketing support such as:

- Recognition of UWSIBC's contribution to your initiative and your organization
- Impact stories and statistics that illustrate positive change resulting from the initiative that UWSIBC is supporting
- Representatives from your organization (staff, volunteers, clients, Board Members) who can act as speakers at various events

Frequently Asked Questions:

Q. How much overall does UWSIBC have available to grant through the Community Fund program?

A. The total amount available to grant is limited, and is based on the amount raised in the United Way's fundraising campaign from its previous fiscal year (April-March). As the 2020-21 fiscal year is just ending, we do not yet have the figures available to grant for 2021-22.

Q. Have you eliminated core funding?

A. No, core funding is available as part of the Capacity Building priority. Core Funding is available on the condition that the funded expenses are aimed at building the organization's capacity and improving its longer-term resilience and sustainability.

Q. What do you mean by "core funding is available on the condition it improves the organization's longer-term sustainability?"

A. If you are applying for core funding under the Capacity Building priority, the funded expenses must be aimed at creating a stronger, more resilient organizational infrastructure that will allow the organization to survive, become more efficient and effective, and thrive in the longer term. For example, an organization could apply for "core funding" to cover expenses related to upgrading its technology infrastructure, developing and implementing a communications plan, conducting impact evaluations, training staff in new methodologies, revamping its strategic plan, and/or many other core expenses (including salaries) not typically funded by other sources.

Q. How much of the budget for our initiative can consist of administrative costs?

A. In recognition that programs and projects must rest on a solid infrastructure, UWSIBC is allowing a healthy allotment for administrative expenses. Administrative expenses can comprise up to 15% of the total budget for your initiative.

Q. What types of expenses can we include as administrative costs?

A. In the budget for your initiative, you can include administrative costs related to the initiative, such as accounting/bookkeeping, insurance, audit, and a reasonable portion of executive, supervisory and support staff wages and benefits.

Q. Can my organization apply for funding for more than one program/project?

A. Yes, however we require a separate application for each initiative. Each initiative must align with UWSIBC's priority areas, and all other eligibility criteria. Please recognize that the funds available to grant are limited, and the application process is a competitive one.

Q. What are the Community Fund application timelines?

A. The Community Fund granting process will occur according to the schedule below:

Orientation & Call for Applications	April 1st
Application Closes	May 31st
Staff Review	June 1st – 6th
Volunteer Impact Team Review and Committee Recommendations	June 7th – July 15th
UWSIBC Board Approval	July 20th
Notifications, Contracts Signed	August
Funding Year	October 1st 2021 - September 30th 2022

Q. How do we complete a Project Logic Model?

A. Below is an example of a Project Logic Model. Please note that you are welcome to submit your organization's existing program logic model/evaluation framework instead as an attachment. Please note that a Logic Model is **NOT** required if you are applying for funding under the Capacity Building priority. See appendix A for an example of a Project Logic Model.

APPENDIX A: Project Logic Model Example

Inputs	Outputs		Outcomes	

The resources needed to operate the program.
Staff, space, expertise, etc.

List the activities associated with the program
Planning, sessions, follow up, records etc.

What are the intended program outputs you will measure?
 # Participants, # Sessions etc.

What are the short term outcomes the programs has for participants?
How will they benefit (behavior change, quality of life etc) from attending?

What are the long- term impacts of this program?
How will the participants and community be different? How do you know?

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8 hours/wk from program coordinator (5 hours for program, 3 for prep)

10 program packages

Activity room (1 hr/day)

5 hours/wk student volunteer

Posters, social media advertisement

PC develops curriculum, posters, program materials

Program runs 1 hour a day, Monday-Friday

PC weekly meeting with student volunteer

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duration of program

number of participants and their attendance

additional services, programs or referrals provided

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successful utilization of coping techniques for anxiety/stress

measurement of overall quality of life (participant survey)

creation of a community of support through program peers

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increased sense of connection to community/community engagement (participant survey)

resiliency due to skill development of techniques for anxiety and stress (survey, future follow up)