

## **Guidelines for Community Service Organizations Applying for the Community Fund Application – PROGRAM/PROJECT**

United Way Waterloo Region Communities (United Way WRC) is pleased to provide support to local community service organizations that provide important community support to vulnerable community members. Applications are made available and reviewed locally. Our aim is to make this application process simple.

This document summarizes guidelines for community service organizations seeking to apply for the Community Fund through United Way Waterloo Region Communities for the purposes of a specific program or project.

### **About United Way Waterloo Region Communities**

United Way Waterloo Region Communities is dedicated to helping people live better lives in every one of the seven communities we serve. We are fundraisers who support a network of agencies whose programs and services are locally focused, informed, connected, and deeply invested in helping people reach their full potential.

### **Timelines for the funding quarter January – March 2022**

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November 12 <sup>th</sup> 2021	Launch of the Community Fund
November 26 <sup>th</sup> 2021	Applications close at 4pm
End of December 2021	Application decisions communicated to applicants

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### **Eligibility**

Organizations may apply to the Community Fund individually, or as part of a network/partnership. Organizations may also seek funds for more than one program/project. Separate requests must be completed for each.

#### The Applicant:

- is a registered charity in Canada, or other qualified donee. The Qualified Donee\*\* includes: registered charities; registered Canadian municipalities; registered municipal or public bodies performing a function of government in Canada.
- maintains a volunteer Board of Directors that meets regularly,
- hosts a public Annual General Meeting,
- has financial statements that have been audited by a licensed public accountant (or financial review/review engagement for charities with annual revenues less than \$250,000),
- grants permission for this application and contact details to be shared with other funders for funding consideration and coordination.
- demonstrates your organization is working toward building equity and inclusion within your workplace, your Board, and in your program delivery.

\*\*If your organization is not a registered charity or otherwise a qualified donee, a sponsoring organization is required to accept payment on behalf of the applicant.

#### **Sponsoring Organizations**

Should your organization require a Sponsoring Organization as part of your application submission, please note the following:

#### The Sponsoring Organization:

- Must be a registered charity.
- Will provide a letter in support of the applicant's application, and acknowledging their role as sponsor.
- Must Sign off on the application: SECTION 5 – AUTHORIZATION AND CONFIRMATION page
- Will Sign off on the Funding Agreement along with the applicant, if the application is successful.
- Will accept payment on behalf of the applicant, if the application is successful and disperse funds to the applicant.
- Will be responsible for repayment/partial repayment of funds allocated should the program or project not be carried out.

Please contact United Way WRC staff for additional details and requirements of this type of arrangement.

## **Organizational Profile & Areas of Service**

Community Service Organizations seeking to apply for the Community Fund for General Operating Support will be asked to provide details about the mission and mandate of the organization, primary activities including location of service delivery in Waterloo Region, and total number of people served across the entirety of the organization.

Key financial information must be provided including an audited financial statement, or review engagement; as well as the organization's annual income, the unrestricted percentage of the organization's annual funding, information on endowments and reserve funds, major sources of revenue, meaningful shifts or changes in current funding sources, anticipated funding changes in the next 3 years, how many months of operating cash or cash equivalents does the organization currently hold, current financial challenges and budget concerns, and what would need to change in order for the organization to feel financially secure. This is to assess the current health of the organization as well as any challenges it may be experiencing.

## **Strategic Plan**

Details on the Strategic Plan or development of same are to be provided. This is to assess the relationships between goals of the organization and its stated mission mandate and corresponding activities. The following is to be included:

- Current strategic plans
- Strategic plan goals
- Description of how current programs/services are designed to achieve such goals
- Changes to recent mission-related activities (in the last 12 months)
- Description of how the organization is working toward building equity and inclusion within the workplace, the Board, and in program delivery
  - Recommended resources:
    - [Access for Ontarians with Disabilities ACT \(AODA\)](#)
    - [Truth and Reconciliation: Calls to Action](#)
    - [How to Promote Racial Equity in the Workplace \(hbr.org\)](#) (Article)
    - [Writing a Diversity and Inclusion Statement](#) (Article)
    - [LGBTQ2+ Terms Reference and Media Style Guide](#)

## Service Information

Community Service Organizations seeking to apply for the Community Fund for a specific program or project will be asked to provide details including a clear description of the project or program proposed, the need being met, who will benefit, and how you will know this difference is being made. A budget, the services and activities they propose, the vulnerable populations these services will reach, and where the services will be delivered within Waterloo Region are also required.

The Community Fund will provide financial support for community services that:

- Address **ONE** of the following Service Areas:
  - *Basic/Essential Needs* (e.g. food, shelter, safety)
  - *Mental Health*
  - *Isolation* (e.g. inclusion and belonging work, settlement, anti-discrimination, etc.)
- Serve one or more vulnerable groups:  
Children and youth; Seniors and elders; People experiencing homelessness; People with low income or living in poverty; People living with mental illness; People struggling with addiction; Persons with disabilities; People experiencing violence; Prison populations; Indigenous; Racialized populations; Members of LGBTQS+ communities; and Newcomers
- Will be carried out with a reasonable budget before March 31<sup>st</sup>, 2022 (**Note that this application is for one quarter only**. The program/project may extend beyond this funding term.)

## Service Description

- What is the issue being addressed by this program?
- How will the funding requested be used?
- Why is this issue important to our community?
- How will you know if the program has been successful in the lives of participants? (include an evaluation plan that describes the outcome(s) you anticipate and how you will measure or assess this change).

## **Grant Request, Budget, and Financial Information**

### **Eligible Expenses for Community Fund:**

All budget items must be project-related and incurred by March 31<sup>st</sup>, 2022. **The term of funding for each grant is 3 months. Agencies are eligible to apply for the same expenses for each quarter.**

Eligible expenses include wages and benefits, professional fees, travel and accommodations, materials and supplies, printing and communication, equipment rental/lease/maintenance, administration costs, capital costs, and disability support for staff. Purchase of lands or buildings, and any expenses that are covered by another funding source, are ineligible.

Reserve Fund information and the most recent audited financial statements are to be provided. This information will be kept on file and updated as necessary by the applicant for future application periods.

If you have questions or need support in completing this application, **please contact:**

- Amanda Melnick, Senior Director, Impact and Stewardship  
[amelnick@uwaywrc.ca](mailto:amelnick@uwaywrc.ca)  
519-888-6100 ext. 210

OR

- Brian Kamm, Manager, Community Investment  
[bkamm@uwaywrc.ca](mailto:bkamm@uwaywrc.ca)  
519-888-6100 ext. 209