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.

NEW for January to March 2023

The Tomorrow Fund Available:

During this round of applications United Way will be granting $182,000 from The Tomorrow Fund. The grants from The Tomorrow Fund will be focused on programs/and or organizations that serve the communities of Cambridge & North Dumfries and address emerging or long-term community needs through new or innovative programs, initiatives that address capacity building and long-term sustainability initiatives will also be considered. If you would like to be considered for this grant please indicate it in your application (questions 4.1.4 & 4.1.5).

This grant money has been made possible through the generosity of donors who have established an enduring legacy through United Way.

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 2023

Sept 12th, 2022	Launch of the Community Fund
Sept 30th , 2022	Applications close at 4pm
Late Oct/Early Nov 2022	Application decisions communicated to applicants

Eligibility

- o Organizations may apply to the Community Fund individually, or as part of a network/partnership.

The Applicant:
- is a registered charity in Canada, or another qualified donee. The Qualified Donee** includes registered charities; registered Canadian municipalities; registered municipal or public bodies performing a function of government in Canada. https://www.ic.gc.ca/eic/siTe/cd-dgc.nsf/eng/cs05010.html
- maintains a volunteer Board of Directors that meets regularly (please include: Board members Name, term, and area of expertise. Contact information is not required).
- 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) Refer to Financial Statements and Review section on the Government of Canada site
- 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 6 – 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.

Anti-Oppression Work

Description of how the organization is working toward building Anti-Oppression work within the workplace, the Board, and in program delivery. Steps to address equity are not uniform between groups of people due to related or diverse identities. Refer to legislation (e.g., AODA) or recommendations (e.g., Truth and Reconciliation Calls to Action as appropriate)
- Recommended resources include (but are not limited to):
    - 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

(Optional) Provide information on training (free or fee for service) provided by your agency to other organizations or professionals that address and support the development of Anti-Oppression work

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 meet, 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 Needs; Mental Health; OR Social Isolation)
- Address **ONE** of the associated Issue Areas within the selected Service Area. Multiple example activities are provided for each Issue Area. These examples are not exhaustive.

1. *Basic/ Needs*

Issue Areas
    a. *Food Security*: e.g., distribution of food products/hampers/hygiene products; access to fresh, culturally appropriate food; programs that teach food related skills, etc.

    b. *Housing & Homelessness*: e.g., Homelessness prevention/housing retention, emergency shelter, finding & securing housing, advocacy, supportive housing, and services/supports to people experiencing/at risk of homelessness, etc.

    c. *Personal Safety or Wellbeing*: e.g., supports & services related to abuse/assault (sexual, physical, emotional), current/historical trauma for people experiencing oppression, including Black, Indigenous, Racialized, 2SLGBTQ+, people with disabilities, immigrants/refugees, etc.

    d. *Employment/Essential Skills & Supports*: e.g., education or practice of employment related skills; education or practice of essential life skills such as literacy, financial literacy, or provision of products that address essentials skills etc.

2. **Mental Health**

Issue Areas
    a. *Education:* e.g., education workshops for people experiencing mental health challenges, family members, friends, or professionals; broader public education *efforts to address stigma and promote understanding*

    b. *Crisis Support:* e.g., walk-in, ongoing or crisis counselling supports, via professional or peer supports etc.

c. *Prevention: e.g., one to one or group counselling that builds capacity, via professional or peer related supports, etc.*

3. **Social Isolation**

Issue Areas
a. *Building/Maintaining Social Connections*: e.g., provision of social opportunities; providing space for individuals to connect; building capacity for individuals to build connections with others in a culturally appropriate manner, etc.

b. Access to Services: e.g., implementing changes to service delivery to ensure accessibility for oppressed groups; providing client advocacy/capacity building to support accessing other services or supports, etc.

c. Leadership Development & Capacity Building: e.g., providing leadership training or opportunities for practice; volunteer recruitment, training, or opportunities; mentorship, 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; People experiencing oppression, including, Black, Indigenous and Racialized populations; Members of LGBTQS+ communities; and Newcomers
- If an application is successfully funded, a Funding Agreement will be signed by the funder and recipient; and a report on program/project impact will be required following conclusion of the term. Reporting periods occur twice per year – Spring and Fall – with deadlines and expectations communicated with sufficient notice.

Service Description
Key questions below. Refer to Appendices for a full copy of questions and additional instructions.

- 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). What does success look like for your program/project?

- Provide specific examples of Program/Project Impact, including available results. Avoid use of customer satisfaction information (e.g. 80% of clients were very satisfied with level of service) , or very high level impact information (e.g. Most clients demonstrated increases in self-esteem).
- Outputs section (3.6): Outputs are counts of services provided, and could include numbers of group programming offered, products distributed or other specifics. Information about changes in client outcomes (e.g. improvements in stress level, self-esteem, knowledge, etc) are better reflected in questions 3.4.4 and 3.4.5.

Grant Request, Budget, and Financial Information
Eligible Expenses for Community Fund:

Funding applications and allocations are provided on a quarterly basis at a maximum request of $50,000. Allocated funding may be carried forward into subsequent quarters but should be spent within one year of allocation.

If the funding requested in this application will cover service delivery beyond the current quarter, please reflect these dates, as well as providing any additional context to address this service delivery time frame, in the appropriate sections of this application (refer to Application questions 3.3.1 - 3.3.3).

Please include the minimum threshold of funding required to offer this program/project, and where if funding is less than this threshold amount, the program/project will be unable to operate (refer to questions 4.1.2 - 4.1.3).

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
  519-888-6100 ext. 210

  OR

- Brian Kamm, Manager, Community Investment
  bkamm@uwaywrc.ca
  519-888-6100 ext. 209

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‹ Application List

General Community Fund - Program/Project Jan-Mar 2023

Last Saved At: Monday, September 12th 2022, 10:59:53 am

IMPORTANT NOTE: This form CAN be saved and edited later.

An application guide - as well as key application and communication timelines - can be found under our Funding Opportunities tab on our website: https://www.uwaywrc.ca/what-we-do/funding-opportunities/

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.
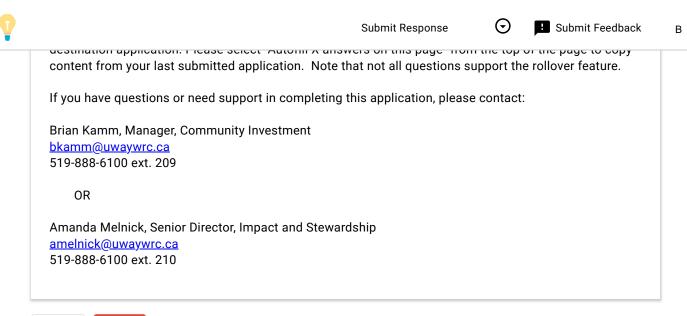
Funding applications and allocations are provided on a quarterly basis at a maximum request of $50,000. Allocated funding may be carried forward into subsequent quarters, but should be spent within one year of allocation.

If the funding requested in this application will cover service delivery beyond the current quarter, please reflect these dates, as well as providing any additional context to address this service delivery time frame, in the appropriate sections of this application..

IMPORTANT NOTE: If the qualified donee is different from the organization submitting the application and responsible for program delivery, then the qualified donee is considered a sponsor with specific responsibilities (see: Application Guide). A sponsor is required to provide a signed letter outlining their support for the application submitted.

INSTRUCTIONS: This application has five sections

  Section 1 – Eligibility
  Section 2 – Contact Information
  Section 3 – Service information
  Section 4 – Grant request, budget and financial information
  Section 5 – Permissions & Exclusions
  Section 6 – Authorization and confirmation

- Application Open Date: Monday September 12th, 2022
- Applications Due: Friday September 30th, 2022 at 4pm
- Applications Decisions Communicated: October 31st to November 4th, 2022

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destination application. Please select "Autofill X answers on this page" from the top of the page to copy content from your last submitted application. Note that not all questions support the rollover feature.

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

Brian Kamm, Manager, Community Investment
bkamm@uwaywrc.ca
519-888-6100 ext. 209

    OR

Amanda Melnick, Senior Director, Impact and Stewardship
amelnick@uwaywrc.ca
519-888-6100 ext. 210

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Section 1: Eligibility

1.1 - Organizations are eligible to complete this application if the organization *

Please ensure all boxes are checked below. Failure to do so may delay processing of your application .

☐ is a registered charity in Canada, or other qualified donee,

☐ 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.

1.1.2 - Board of Directors List *

Please upload a copy of your current Board of Directors list, including: full name, board position, term length, and area of expertise.

Maximum of 1 files
File types accepted: any
Max file size of 20 MB.

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SECTION 2: Organization Contact Information   ✎ AUTOFILL ANSWERS

 Reminder: If the qualified donee is different from the organization submitting the application and responsible for program delivery, then the qualified donee is considered a sponsor with specific responsibilities (see: Application Guide).

2.1.1 Name of Organization Administering Program *

 Organization that is delivering the program/initiative.

If a fiscal sponsor was involved in the related application, please list them in section 2.2.1. If your organization does not require a fiscal sponsor, your organization name should be listed here (2.1.1) AND section 2.2.1.

Short answer text

2.1.2 - Contact Name: *

Contact person for this application.

Short answer text

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2.1.3 - Contact Position Title: *

Short answer text

2.1.4 - Contact Email: *

Short answer text

2.1.5 - Contact Phone Number: *

Short answer text

2.2.1 - Organization Name (sponsor or qualified donee): *

Reminder: If your organization has a fiscal sponsor, the name of the fiscal sponsor organization goes here (), while the organization administering the programs, activities or initiatives being reported on should be listed in 2.1.1.

If your organization does not require a fiscal sponsor, the organization name should be listed here (2.2.1), AND in 2.1.1.

Short answer text

2.2.2 - Executive Contact Name: *

Executive Director, Chief Executive Officer or equivalent related to this program application.

Short answer text

2.2.3 - Executive Contact Position Title *

Short answer text

2.2.4 - Executive Contact Email: *

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2.2.5 - Executive Contact Phone Number *

Short answer text

2.3.1 - Street Address or P.O. Box: *

Short answer text

2.3.2 - City/Town: *

Short answer text

2.3.3 - Province or Territory: *

Short answer text

2.3.4 - Postal Code *

Short answer text

2.3.5 - Agency Website:

Short answer text

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2.3.7 - Charitable Number / Incorporation Number: *

For the sponsor or qualified donee

Short answer text

2.3.8 - Organization Mission: *

Maximum 25 words.

Long answer text

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Section 3.1: Service Information   [🖌 AUTOFILL ANSWERS]

3.1.1 - Program Name: *

Short answer text

3.1.2 - One-Line Description: *

Statement should identify the who, how and why of the program. This statement will be used in United Way WRC marketing materials when informing community about the work of this program (max 25 words)

Long answer text

3.1.3 - Populations Served *

Please select those populations that you **primarily serve**. For groups not otherwise specified, please describe.

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- Children and youth: ages 19 to 29
- 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 (detained and incarcerated)
- Indigenous
- Racialized Populations
- Black
- People identifying as 2SLGBTQ+
- Newcomers

3.1.4 - Groups not otherwise specified.

Please describe (max 100 words).

Long answer text

3.1.5 - Please describe how your organization is/plans on working toward building anti-oppression/equity and inclusion within your workplace, your Board, and in your program and service delivery. *

Please be as specific as possible. Steps to address equity are not uniform between groups of people due to related or diverse identities. Identify particular groups and concrete steps that your organization takes to address equity. Refer to particular legislation (e.g. AODA) or recommendations (e.g. Truth and Reconciliation Calls to Action) as appropriate (max. 500 words).

Long answer text

3.1.6 - Please summarize any training or resources your organization provides to organizations to support service delivery to marginalized populations (if applicable)

We are compiling a list of resources to help move anti-oppression work forward in our community. If your organization offers training or services to support Equity work please feel free to list what those services are.

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Long answer text

3.1.7 Upload key training/resource documents related to Equity Diversity & Inclusion supports to external organizations (if applicable)

 Key Resources could include (but are not limited to), a summary of training/resources provided by your organization, fee schedule, or foundational documentation related to your EDI work

Maximum of 2 files
File types accepted: any
Max file size of 20 MB.

☁ **UPLOAD FILE**

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3.2 & 3.3: Geography & Duration   🪣 AUTOFILL ANSWERS

3.2 Geographic Areas of Service *

In which geographic regions do you operate/serve participants? Select all which apply.

- ☐ Cambridge
- ☐ Kitchener
- ☐ Waterloo
- ☐ North Dumfries
- ☐ Wellesley
- ☐ Wilmot
- ☐ Woolwich

3.3.1 -Funding Start Date: *

(for which funding applies): DD/MM/YY

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3.3.2 -Funding End Date *

 for which funding applies: DD/MM/YY

Short answer text

3.3.3 Funding Time Frame & Additional Context *

 Funding applications and allocations are provided on a quarterly basis at a maximum request of $50,000. Allocated funding may be carried forward into subsequent quarters, but should be spent within one year of allocation.

If the funding requested in this application will cover service delivery beyond the current quarter, please reflect these dates in 3.3.1 and 3.3.2 as well as providing any additional context to address this service delivery time frame.

e.g. Program funding requested is $40,000, and is anticipated to cover program related activities for a six month period, October 2022 - March 2023.

Short answer text

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3.4 & 3.5: Service Description   ◆ AUTOFILL ANSWERS

3.4.1 - What is the issue being addressed by this program? *

(max 300 words).

Long answer text

3.4.2 - How will the funding requested be used? *

List the key program activities (max 250 words)

Long answer text

3.4.3 - Why is this issue important to our community? *

Please include local research or statistics. Be as specific as possible (max 300 words).

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3.4.4. - How will you know if the program has been successful in the lives of participants? *

 Please include an evaluation plan that describes the outcome(s) you anticipate and how you will measure or assess this change. Be as specific as possible, including the methods used (e.g. surveys, staff observations, staff notes, interviews etc) (max 400 words).

Long answer text

3.4.5. - Provide examples of Program/Project Impact, including available results. *

 Please be as specific as possible, including statistics that demonstrate the impact of your organization. (e.g. 85% of clients experienced decreased distress levels following counselling).

Avoid use of client satisfaction data (e.g. 90% of clients were happy with the services provided), or very high level, summary impact (e.g. Most clients improved in self-esteem).

Short answer text

3.5.1 Primary Area of Focus *

 Select the **primary** service area that this program/project proposal will address (select one).

United Way WRC recognizes that agencies often work in multiple Areas of Focus, however for purposes of applying and subsequent reporting expectations, please select the most applicable area of focus.

- ◯ Basic Needs
- ◯ Mental Health
- ◯ Social Isolation

3.5.2 Primary Issue Area *

 Choose ONE Primary Issue Area from the list of 10 options below that is associated with the Primary Area of Focus selected in 3.5.1. Please refer to the GCF Application Guide - Program/Project Oct-Dec 2022, pp 4-5 for additional details about Primary Issue Areas.

United Way WRC recognizes that agencies often work in multiple Issue Areas, however for purposes of applying and subsequent reporting expectations, please select the most applicable Issue Area.

○ Basic Needs: Housing & Homelessnes

○ Basic Needs: Personal Safety or Wellbeing

○ Basic Needs: Employment/Essential Life Skills & Supports

○ Mental Health: Education

○ Mental Health: Crisis Support

○ Mental Health: Prevention

○ Social Isolation: Building/Maintaining Social Connections

○ Social Isolation: Access to Services

○ Social Isolation: Leadership Development & Capacity Building

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3.6: Outputs Tracking

AUTOFILL ANSWERS

Outputs are counts of service units

3.6.1 - What outputs are you tracking? *

e.g. # of food hampers, # of counselling sessions, etc. Minimum of three required. (max 250 words)

Long answer text

3.6.2 - How many unique individuals do you anticipate serving? *

Please enter a number without symbols or decimals (ex. 5000).

Short answer text

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3.7: Partnerships & Networks

🖊 **AUTOFILL ANSWERS**

3.7.1 Is this program/project being delivered by a coalition of agencies or through a partnership table in your community? *

If yes, please provide details about the coalition (e.g. lead agency, member agencies, roles). (max. 200 words)

Long answer text

3.7.2 - Who do you consider to be important partners for your organization? *

This may include formal or informal networks or partners (Max 250 words).

Long answer text

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Section 4: Grant Request, Budget & Financial Information

🖌 AUTOFILL ANSWERS

4.1.1- What is the total grant request from United Way Waterloo Region Communities? *

Maximum request is $50,000 for the term/quarter. Please enter a number without symbols or decimals (ex. 5000).

Short answer text

4.1.2 - Will the service be provided if awarded a lesser amount? *

◯ Yes

◯ No

4.1.3 If funding is allocated at less than the amount requested, how will this impact the proposed program/project delivery?? *

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Please provide a *brief* summary of how deliverables will change based on scenarios where a portion of requested funds is provided i.e. at 80%, 50% and 25% of funding as requested in 4.1.1.

Please include the minimum threshold of funding required to offer this program/project, and where if funding is less than this threshold amount, the program/project will be unable to operate.

Short answer text

4.1.4 Would you like this application to be considered for The Tomorrow Fund, alongside the General Community Fund? *

 During this round of applications United Way will be granting $182,000 from The Tomorrow Fund. The grants from The Tomorrow Fund will be focused on programs/and or organizations that serve the communities of Cambridge & North Dumfries and address emerging or long-term community needs through new or innovative programs, initiatives that address capacity building and long-term sustainability initiatives will also be considered. If you would like to be considered for this grant please indicate it in your application.

This grant money has been made possible through the generosity of donors who have established an enduring legacy through United Way.

○ Yes. Consider this application for the Tomorrow Fund, in addition to the General Community Fund

○ No. Consider this application only for the General Community Fund.

4.1.5 Briefly describe how this application aligns with The Tomorrow Fund.

 Include information on how this application will serve the communities of Cambridge & North Dumfries addressing emerging or long-term community needs through new or innovative programs, initiatives that address capacity building or long-term sustainability initiatives.

Long answer text

4.2 Program Budget. *

 Please upload your program budget table here.

Budget Instructions:

• You may use your own budget template.

• **PLEASE ENSURE THAT YOUR BUDGET ACCOUNTS FOR THE FULL INCOME AND EXPENSES OF YOUR SERVICE INCLUDING GRANTS YOU HAVE REQUESTED**. All budget items must be service related and must be incurred within one year of funding allocation.

• Eligible expenditures include: wages and benefits, professional fees, travel and accommodations, materials and supplies, printing and communication, equipment rental/lease/maintenance, administration costs, and capital costs. Ineligible expenditures include purchase of real property.

• Where there are multiple sources of income from the Federal Government, Provincial / Territorial Governments, Municipal Governments,

Maximum of 1 files
File types accepted: any
Max file size of 20 MB.

☁ **UPLOAD FILE**

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4.3 - Audited Financials & Reserve Funds

🖋️ **AUTOFILL ANSWERS**

4.3.1 Please upload a copy of your audited financial statements or review engagement. *

If your organization has a fiscal sponsor, then an audited financial statement/review engagement is required from this organization. For organizations that do not have a charitable number, a statement showing financial position to date is required as well.

Maximum of 2 files
File types accepted: any
Max file size of 20 MB.

☁ **UPLOAD FILE**

4.3.2 - Does your organization have one or more reserve funds? If yes, please complete the field below for each reserve fund. *

(1) Name of Reserve Fund (2) Source of Funding (3) Restricted contributions (designated by donors for a specific purpose) (4) Unrestricted contributions (approved by Agency Board) (max. 250 words)

Long answer text

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Section 5: Application Sharing - Permissions & Exclusions

✎ AUTOFILL ANSWERS

Please indicate below whether you share permission for United Way WRC to share information provided in this application with the community, or if you have specific exclusions and limits as to what's shared.

Special Note:
- Staff & Organization Contact details, and sensitive financial details *will not* be shared. Permission in this section is with respect to program impact and related details, particularly from Sections 3 - 3.7.

Our organization provides United Way WRC with permission to share in whole or in part the provided report with community members, including through social media, letters, reports, emails, website and other methods of communication. *

○ FULL PERMISSION is granted to United Way WRC to share information from this application in whole or in part with members of the community.
○ NO PERMISSION is granted to United Way WRC to share any information from this application with members of the community.
○ PARTIAL PERMISSION is granted to United Way WRC to share information from this application with community. Exclusions will be provided in section

EXCLUSIONS to Sharing Reporting Information

Please indicate below any items from your report you DO NOT want shared with the community.

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Section 6: Authorization & Confirmation

Please download a copy and complete the file in this Google Drive link:

https://drive.google.com/file/d/1KACNABzrG-KoMMnHE5Vfk-MyHAkaW62Z/view?usp=sharing

Please upload your authorization and confirmation form here. *

In cases where there is a financial sponsor, both the sponsor and the organization administering the program must sign off on the authorization form.

Maximum of 1 files
File types accepted: any
Max file size of 20 MB.

☁ UPLOAD FILE

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