

Guidelines for Community Service Organizations Applying for the Community Fund Application - UNRESTRICTED/GENERAL OPERATING SUPPORT (GOS)

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.

GOS is unrestricted funds to support an organization's ability to achieve its mission overall. This type of grant is flexible and allows grantees to allocate funds towards self-identified organizational priorities in order to develop and strengthen their internal systems.

Forever Fund Grant Available (for October to December 2023 quarter only):

The Forever Fund is a donor directed fund. A total of \$36,000 is available through the 2023 Forever Fund grants to be distributed to programs and/or organizations that are working in the areas of Mental Health Supports for Children & Families (\$21,100) and Innovative Initiatives for Seniors at Risk (\$14,900). If you would like to be considered for these grant amounts alongside your General Community Fund application please indicate this in your application (questions 4.1.7 - 4.1.9).

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.

NEW: Theory of Change and Revised Issue Areas

In order to be clearer when communicating with community about United Way WRC investments, a Theory of Change statement has been created. In this application, and other communications materials, revisions to our Issue Areas are also included for greater clarity.

The Theory of Change is:

Poverty is Complex

As a community, we need to meet head on the root causes of poverty that produce the greatest needs for the most marginalized people in Waterloo Region. Not all community

members have equitable access to the tools to break the cycle of poverty. This can be because of language, available resources, experiences with systemic racism and historical trauma, homophobia & transphobia, ableism and other factors.

At United Way Waterloo Region Communities, we believe that there are many solutions to the complexity of poverty. We believe in acting on the expertise of local service providers, investing in key interconnected areas that meet practical needs and address barriers that stop our community from thriving. These critical areas of investment will contribute to moving people out of poverty:

- *Food Insecurity*
- *Affordable Housing & Homelessness*
- *Hate, Gender-based and Family Violence*
- *Literacy, Employment Skills & Assistive Devices*
- *Mental Health & Addictions*
- *Community & Social Supports*
- *Leadership, Volunteerism, & Capacity Building*
- *Children & Youth*
- *Innovation & Systems Change*

Summary of Revisions to Issue Areas

The broad Focus Areas used previously as a top level of alignment (I.e. Basic Needs, Mental Health, Social Isolation) will no longer be used in most materials in the interests of simplification.

The Issue Areas, which would align under one of the three historical Focus Areas, will largely remain, with some key changes:

- A) Titles of each Issue Area have been rewritten for greater clarity. The descriptions of those Issue Areas has not changed at this time.
- B) What was known as “Advancing Equity” or “Access to Service” has been removed as it’s own Issue Area. In its place, equity has been integrated as part of United Way WRC’s Theory of Change cited above.
- C) Two new Issue Areas have been added: Children & Youth; and Innovation & Systems Change
- D) Specific changes to Issues Areas are also documented below.

Timelines for the funding quarter October - December 2023

July 10th, 2023 Launch of the Community Grants

July 28th, 2023 Applications close at 4pm.

Early Sept 2023 Application decisions communicated to applicants

Eligibility

- 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.

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 Anti-Oppression, 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](#)

The Community Fund will provide financial support for organizations that:

- Address **ONE** of the Issue Areas below. Multiple example activities are provided for each Issue Area. These examples are not exhaustive.

NOTE: United Way WRC recognizes that organizations frequently work in more than one Issue Area. Please select ONE Issue Area for purposes of clarity during allocations and reporting processes.

Issue Areas:

1. **Food Insecurity** (formerly *Food Security*): e.g., distribution of food products/hampers/hygiene products; access to fresh, culturally appropriate food; programs that teach food related skills, etc.
2. **Affordable Housing & Homelessness** (formerly *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.
3. **Hate, Gender-based and Family Violence** (formerly: *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.

4. **Literacy, Employment Skills & Assistive Devices** (formerly: *Employment/Essential Life 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/activities of daily living etc.
5. **Mental Health & Addictions** (formerly: *Mental Health- Education; Crisis Support; Prevention*): Can include elements of education, crisis support or prevention e.g., education workshops for people experiencing mental health challenges, broader public education efforts to address stigma and promote understanding; walk-in, ongoing or crisis counselling supports, via professional or peer supports; one to one or group counselling that builds capacity, via professional or peer related supports, etc.
6. **Community & Social Supports** (formerly *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.
7. **Leadership, Volunteerism, & Capacity Building** (formerly: *Leadership Development & Capacity Building*): e.g., providing leadership training or opportunities for practice; volunteer recruitment, training, or opportunities; mentorship, etc.
8. **Children & Youth** (NEW): Setting up children and youth for success. e.g. age specific counselling, mentorship programs, afterschool and weekend food, homework help and tutoring, bullying prevention, community centre spaces, and leadership and volunteer opportunities.
9. **Innovation & Systems Change** (NEW): meet the complex needs of our community by solving problems through technology, building capacity, and bringing new programs and partnerships to life to move our community forward.

Advancing Equity/Access to Services were ~~deleted as an Issue Area~~, and incorporated into overarching United Way WRC Theory of Change for Community Investment.

Proposal

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

- How much funding is being requested
- What will this funding allow the organization to do or what difference will this funding make to the organization
- What gets in the way of the organization achieving its mission

- What short and long-term strategies, if any, had been identified for addressing these obstacles
- What collaboratives/networks is the organization actively involved in and why
- How the effectiveness of the organization is tracked and measured
- A summarization of key findings and/or results that demonstrate the organization's impact. 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).

Grant Request 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 in 4.1.3 and 4.1.4 as well as providing any additional context to address this service delivery time frame.

It is understood that intended service delivery will be impacted and require updates to plans as outlined in the application (question 4.1.2) if funding at less than the requested amount is provided.

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.

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
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