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Guidelines for Community Service Organizations Applying for the Community Fund Application - UNRESTRICTED/GENERAL OPERATING SUPPORT (GOS) Community & Social Supports and Literacy, Employment Skills, and Assistive Devices Q3 2025

About United Way Waterloo Region Communities

At United Way Waterloo Region Communities, we are 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 are invested in helping people access the tools they need to thrive.

About the GOS Grant

The GOS (General Operating Support) grant is designed to provide flexible funding that supports an organization's overall mission. With minimal restrictions, this grant empowers recipients to allocate funds toward their self-identified priorities, helping to strengthen internal systems and enhance organizational capacity. If your proposal primarily focuses on a specific aspect of your services, it may be better suited for a program/project application. For more details, please refer to the Program/Project Guide.

A copy of the Application Questions is appended to this document.

Community Impact Fund Process Changes

Over the past four years, our application model was tailored to address the evolving challenges posed by the pandemic and its aftermath. By adopting a quarterly funding approach, we

prioritized flexibility, enabling us to adapt to shifting community needs and fluctuating fundraising outcomes. However, this reliance on short-term funding cycles brought its own challenges. Organizations faced difficulties in planning annual budgets with funding secured only one quarter at a time, while the frequent application process placed significant demands on the time and resources of both applicants and United Way WRC.

Our transition to an annual funding model is intended to streamline our process and enable deeper, more impactful funding commitments. However, we recognize that this shift may lead to fewer applicants being funded per cycle unless fundraising revenue increases. We deeply regret that our current resources are insufficient to fully address the critical needs of the most vulnerable in our region, and we are actively working to close this gap. Before investing your time in this process, please note that our capacity to invest in new programs or organizations is extremely limited at this time.

While we will continue accepting applications quarterly, each quarter will focus exclusively on one or two designated Issue Areas. For the upcoming quarter (July-September 2025), applications will be open solely to organizations aligned with the Children & Youth, and Hate, Gender Based & Family Violence Issue Areas outlined below. If you're unsure whether your organization qualifies or wish to propose an initiative not listed, please contact United Way staff for guidance.

Q3 Community & Social Supports and Literacy, Employment Skills, and Assistive Devices Issue Area Descriptions

Community & Social Supports

A sense of belonging and connection is essential to our well-being. Services or activities that unite people through shared goals or interests, provide systems navigation, and offer wrap-around support help ensure that everyone can fully participate and feel valued in their community.

To provide greater clarity, we've divided the Issue Area into subcategories. You will be asked to select the two categories that best represent the services outlined in your application.

Community & Social Supports Sub-Categories

- Systems Navigation
- Culturally informed services/support

- Settlement Services
- Formal or informal wrap-around services
- Cultural Festivals/Community Gatherings
- Restorative Justice
- Community Centers
- Land Based Healing/Education
- Social Enterprise Projects
- Peer Support
- Providing space for individuals to connect;

Literacy, Employment Skills, and Assistive Devices

These essential skills and tools empower individuals to fully engage in daily life. Whether it's academic support, job-related education, financial literacy, or assistive devices that promote independence, these resources provide the foundation for people to thrive and reach their full potential.

Literacy, Employment Skills, and Assistive Devices Subcategories

- Adult Literacy Support
- Children and Youth Literacy Support
- Employment Skills
- Tutoring
- Education/practice of essential life skills
- Assistive Devices

An assistive device is a tool or piece of equipment that helps people perform tasks and activities independently. Assistive devices can help with mobility, vision, communication, and more

If you are unsure if you qualify for this quarter, please reach out to United Way WRC staff before applying.

Important Dates Q3 2025

Monday July
14th, 2025

Applications Open

Thursday July 31st, 2025	Applications close at 4:30 PM
Mid to Late September	Application decisions communicated to applicants

The Tomorrow Fund

In this cycle, United Way WRC will be awarding \$40,000 through *The Tomorrow Fund*. This fund will be designated to programs and organizations that serve the communities of **Cambridge and North Dumfries**, with a focus on addressing **emerging or long-term community needs**.

Priority will be given to **new or innovative initiatives**, as well as those that focus on **capacity building** and **long-term sustainability**.

If you meet the requirements, and would like to be considered for this funding, please indicate this in your application.

This funding opportunity is made possible thanks to the generosity of donors who have chosen to leave a lasting legacy through United Way.

Choosing an Issue Area if you don't qualify for this quarter:

Detailed descriptions of each Issue Area can be found on pages 14-16

Q3 October 1st 2025 – September 30th 2026

- Community & Social Supports
- Literacy, Employment Skills & Assistive Device
 - Applications (open/close): July 14th – August 1st 2025
 - Outcomes Communicated: September 1st to 5th 2025
 - Payment (if successful): Early October 2025
 - Reporting for Q3 (open/close): October 2026

Q4 January 1st 2026 – December 31st 2026

- Mental Health & Addictions
- **Food Insecurity

- Applications (open/close): October 14th – 31st 2025
- Outcomes Communicated: December 1st – 5th 2025
- Payment (if successful): Early January 2026
- Reporting for Q4 (open/close): January 2027

Q1 April 1st 2026 – March 31st 2027

- Housing and Homelessness
 - Applications (open/close): Feb 2nd – Feb 20th 2026
 - Outcomes Communicated: Week of March 17th 2026
 - Payment (if successful): Early April 2026
 - Reporting for Q2 (open/close): April 2027

Q2 July 1st 2026 – June 30th 2027

- Children & Youth
- Hate, Gender-Based and Family Violence
 - Applications (open/close): April 13th – May 1st 2026
 - Outcomes Communicated: June 1st to 5th 2026
 - Payment (if successful): Early July 2026
 - Reporting for Q2 (open/close): July 2027

Number of Application Submissions Per Quarter:

Previously, applicants could submit an unlimited number of applications each quarter. Under the new guidelines, each applicant can submit **one application per quarter**, *including any collaborative applications*.

Successful Applications

If you are awarded funding, you will be ineligible to reapply until one year has passed from the quarter in which you received the funding. For instance, if you receive funding in Q1 2025, you may reapply no earlier than Q1 2026.

Note that if you change your application's alignment in a subsequent year, the quarter in which you apply may be later. For instance, if you receive funding in Q1 2025 ("Affordable Housing & Homelessness"); and wish to apply under the Issue Area "Children & Youth" the following year, you will be able to apply in Q2 2026.

Minimum and Maximum Grant Request

- Minimum request for the yearly funding term is **\$20,000**
- Maximum request for the yearly funding term is **\$160,000**

New Reporting Model

If your application is successful and you receive funding, reporting on the use of funding will be due one year from the allocation date. More details will be provided in the funding agreement, and a reminder will be sent when the report opens.

Collaborative Application Option

Network Applications

Historically, Network Applications were available as "Self-Organized Network Applications." This investment option supports networks that represent:

- Groups of similar service providers collaborating as an organized network of service, or
- Complementary services working together on a common issue.

Each organization may submit only one application per funding cycle, either individually or as part of a collaborative submission. If a network is successfully funded in one quarter, they may not apply again until 12 months from the funding start date have passed.

Application Requirements

Organizations interested in submitting a Network Application **must** contact United Way Waterloo Region Communities (United Way WRC) staff at least **two weeks before the application deadline**.

Funding Details:

- Hard maximum funding request: **\$400,000**
- Networks must align with **one United Way WRC Issue Area focusing on addressing poverty**

- A **Lead Organization** must be identified to manage the application and reporting process
- Networks must evaluate their work using **consistent methods and indicators across all partners**
- A **Network Memorandum of Understanding (MOU)** must be created, signed, and submitted within **three months** of receiving United Way WRC funding

Roles & Expectations

Network Lead Organization Responsibilities:

- **Must** be a **registered charity or eligible donee**
- Responsible for **coordinating** the application and reporting submission
- Lead the **creation and sign-off** of the Network MOU between members

Network Member Organization Responsibilities:

- Deliver programs and services as agreed upon
- Fulfill responsibilities outlined in the Network MOU
- Provide necessary organizational information to the Network Lead Organization
- Sign off on the United Way WRC Funding Agreement (if applicable)

This funding opportunity fosters collaboration among organizations working to address poverty in the Waterloo Region, ensuring coordinated efforts for greater community impact.

How are grant applications evaluated?

Each application is carefully reviewed by a team of trained volunteers, consisting of community members from diverse backgrounds. As a community-based funder, UWWRC values the insight and input of local voices in our evaluation process. Volunteer feedback is an essential component of staff deliberations, contributing to final funding decisions alongside several other key factors.

Staff members bring their expertise in community services to the review process, complementing the varied experiences and perspectives of our volunteer reviewers. This diverse mix of knowledge strengthens the evaluation process, resulting in more well-rounded and informed funding decisions.

Given the high volume of applications UWWRC receives, it's essential to clearly articulate your program, service, and the related community needs in every application. Providing a detailed and compelling picture ensures that the full impact and value of your work are effectively communicated.

Most questions are evaluated on a 1–5 rating scale based on the criteria outlined in this guide, with scores averaged to produce a final rating. Reviewers and staff also provide comments throughout the application, responding to prompts that align with the evaluation criteria for each section.

New Process FAQ

Q: Can I apply for multiple quarters?

You may apply for multiple quarters if you have not received funding from us in the past 12 months, provided you meet the eligibility criteria for each quarter's Issue Area.

Q: What happens if my application does not align with the designated Issue Area?

Applications that do not meet the quarter's eligibility criteria will be pulled from the review process.

Q: Can I apply for funding under a different project or stream if I've already received funding?

No. Only one funded application per organization is permitted per year. This does not include organizations acting as a sponsor.

Q: Will both streams be available for every quarter?

You will have the option to select GOS or Program/Project each quarter or be part of a collaborative application.

Q: What if I want to apply under a different Issue Area than the one I was previously funded for?

You must wait at least 12 months from your funding start date before applying again. If you wish to apply under a different Issue Area, you will need to wait until the next funding cycle, which would extend beyond a year. For instance, if you receive funding in Q1 2025 ("Affordable Housing & Homelessness"); and wish to apply under the Issue Area "Children & Youth" the following year, you will be able to apply in Q2 2026

Tips for a High-Scoring Application

- Be clear about the connection to this quarter's Issue Area throughout the application. Applications will be evaluated on the strength of alignment to the quarter's Issue Area
- Reviewers and staff will also be evaluating how anti-oppression, equity, diversity and inclusion is integrated into your organization. There is additional criteria provided in this guide

- Answer the prompts under the questions, and refer to the guide for additional evaluation criteria

Theory of Change

Poverty is Complex

To address such a complex issue, we first need to understand the root causes of poverty, and how systemic discrimination creates unequal access to resources, including the tools to break the cycle of poverty.

Barriers to breaking the cycle of poverty include: language, mental health and addiction challenges, unemployment, trauma, and discrimination based on race, class, ability sexual orientation/gender identity, Immigration status, and other factors.

At United Way Waterloo Region Communities, we believe in the network of services to address the unmet needs of community members who are experiencing marginalization. We invest in the expertise of local service providers to address the key interconnected areas that prevent people in our community from reaching their full potential. We believe that these critical areas of investment will contribute to moving people out of poverty:

Application Breakdown

Eligibility: Section 1

To qualify for funding, the applicant must:

- Be a registered charity in Canada, qualified donee **OR has a registered charity/qualified donee sponsor their application. Please refer to the [Sponsored Application Checklist](#) for how to fill out an application using a sponsor**
 - 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>
- Maintain a volunteer Board of Directors that meets regularly
 - (please only include: Board members name, term, and area of expertise. Contact information is not required).
- Hold a public Annual General Meeting.
- Have 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
- Grant permission for this application and contact details to be shared with other funders for funding consideration and coordination.
- Be working toward building equity and inclusion within your workplace, your Board, and in your program delivery.
- Offers services that align with the Community & Social Supports/Literacy, Employment Skills, and Assistive Devices Issue Area

Sponsoring Organizations Brief Overview

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 or qualified donee
- 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 review the [Sponsored Application Checklist](#) for additional information on the requirements of this arrangement. You can provide the "[What to expect for sponsors](#)" document to your prospective sponsor.

New Question in Section 3: Organization Profile

We've divided the Issue Areas into subcategories to provide greater clarity in our external communications. Please select the two that best align with the information in this proposal.

Community & Social Supports

- Systems Navigation
- Culturally informed services/support
- Settlement Services
- Formal or informal wrap around services
- Cultural Festivals/Community Gatherings
- Restorative Justice
- Community Centers
- Land Based Healing/Education
- Social Enterprise Projects
- providing space for individuals to connect;

Literacy, Employment Skills, and Assistive Devices

- Adult Literacy Support
- Children and Youth Literacy
- Employment Skills
- Tutoring
- Education or practice of essential life skills
- Assistive Devices

Please note that the maximum that you can select is 2 from the list above

NEW SECTION: Services in the Townships (If applicable): 3.4

United Way aims to make impactful investments across all seven areas within the Region of Waterloo. This section is designed to spotlight organizations that provide direct services in the townships of North Dumfries, Woolwich, Wilmot, and Wellesley.

3.4.2 - Please describe the services you offer in the townships (particularly if your main location is elsewhere)

3.5 Areas of Service

NEW - Organizations affiliated with a national or provincial body must include a financial document that reflects the financial position of their local branch. If your branch operates independently and has its own charitable registration number, this requirement does not apply.

NEW QUESTION: 3.5.2- Please upload your National and Local branch's Financial Statement/Review Engagement

*IMPORTANT: In the **next** financial section (3.6-3.8), please upload a document that reflects your **local office's financial position** in the audited financial section. This can be anything from a balance sheet, Draft financial statement, or an audited statement if you have one.*

All answers in the financial section of the application should refer to your local branch.

Finances: Section 3.6 - 3.8

Financial Information is used to assess the current health of your organization. This information is only evaluated by United Way WRC staff.

Required key financial information includes:

- An audited financial statement, or review engagement
- Your organization's annual income
- Percentage of your annual funding that's unrestricted
- Information on endowments and reserve funds
- Top 10 Major sources of revenue
- Pending Grant Applications
- How many months of operating cash or cash equivalents does the organization currently holds,

NEW QUESTION: 3.8.2 - Please list any pending grant applications submitted to other funders that may be awarded within the next three months.

This information helps us better understand your organization's ongoing efforts to secure diverse funding sources and build financial sustainability. (Max 300 characters)

NEW REQUIREMENT: 3.8.3 - Audited Financial Statements or Review

Engagement: File Upload (MAX 2)

*Financial statements or review engagements **older than March 2025 require additional documentation** to show the current financial position. This can be a draft financial statement, balance sheet, review engagement etc.*

NEW QUESTION: 3.8.4- Would you like to share any additional context to help us better understand your organization's current financial position?

This is an opportunity to highlight any factors that may not be immediately clear in your financial statements. For example, you may wish to explain significant changes in revenue

or expenses, new or ending funding relationships, unexpected costs, or recent organizational changes (such as restructuring or expansion). (Max 250 words)

Strategic Plan: Section 3.9

This information is used to assess the relationships between the goals of your organization, the stated mission mandate, and corresponding activities.

3.9.1 and 3.9.2 - What are your organization's strategic priorities, and how are the priorities determined? (Formerly: What is your strategic plan, and what are your strategic goals?)

Examples of Organizational Priorities: Long term goals, Organizational values, Strategic Plan, Fundraising Strategies

Examples of how priorities could be determined: Consulting elders, implementing feedback from clients, consulting people with lived experience, discussing with the board of directors

- **3.9.3** - Changes to recent mission-related priorities (in the last 12 months)
- **3.9.4** - 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](#)

Anti-Oppression Framework

Description of how you're integrating principals of Equity, Diversity, Inclusion in the workplace, board, and through service delivery. Steps to address equity are not uniform between organizations due to related or diverse identities.

Examples of what we're looking for:

- Prioritizing EDI through integrated policies and actions
- Demonstrating clear, actionable examples of these efforts
- Actively recruiting and retaining diverse staff and leadership
- Hiring people with lived experience
- Mention of measurable goals, data and reports to demonstrate progress
- Workshops, Trainings, and Consultants
- For primarily Eurocentric lead organizations, this may include addressing: Anti Racism, Decolonization.

(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

Proposal: SECTION 4

Key questions below.

- 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 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 the 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).

NEW QUESTION: 4.1.2- What are your current priorities for United Way funding, and how do you plan to use the funds

We understand that priorities may shift over time—if funded, any changes can be reflected in your annual report.

NEW QUESTION: 4.1.3 - How will this funding strengthen your organization's ability to carry out its mission, respond to community needs, or increase your overall impact?

By design, GOS is flexible and can be directed to emerging issues and help cover admin and operational expenses. With this in mind, we ask that you share your overall impact as an organization, and how our flexible funding would support that work.

Grant Request and Financial Information

Eligible Expenses for Community Impact Fund: Section 3.6

- The maximum request per year is \$160,000, and the minimum is \$20,000

We can't guarantee that the full funding request will be granted, so we ask you to briefly explain how your proposal will be affected if the funding amount is 80%, 50%, and 25% of the request.

Eligible Expenses:

- wages and benefits,
- professional fees,
- travel and accommodations,
- materials and supplies,
- printing and communication,
- equipment rental/lease/maintenance,
- administration costs,
- capital costs
- disability support for staff.

Ineligible Expenses:

- Purchase of lands or buildings
- Expenses that are covered by another funding source

Upcoming Issue Areas' Eligibility Criteria

Mental Health & Addictions

Asking for help can be daunting, but accessing mental health and addiction support should be simple, stigma-free, and tailored to individual needs—ensuring no one is left behind. This grant allows us to break down barriers, expand access, and provide personalized support, helping to build a system where mental health care is a right, not a privilege.

- Crisis support
- Prevention
- *walk-in/appointment based*
- Peer support
- *One to one or group counselling*
- *Trauma counselling*
- *Specialized counselling*
 - a. *Related to Disability*
 - b. *Culturally Relevant Counselling*
 - c. *Marginalized Identities such as LGBTQIA+ people*
- Can include elements of education,
- Public education *efforts to reduce stigma*

Food Insecurity

Everyone deserves access to healthy, fresh, and culturally appropriate food, yet food insecurity affects individuals and families in our community every day. Expanding access to nutritious food and building food-related skills are essential steps in breaking the cycle of poverty and creating a stronger, healthier community.

- Distribution of food products/hampers
- Access to fresh, culturally appropriate food
 - Including farming/growing food
- Programs that teach food-related skills such as cooking

Affordable Housing and Homelessness

Poverty is a multifaceted issue influenced by numerous intersecting factors that can hinder an individual's ability to meet basic needs such as shelter. This quarter's funding focus is on Affordable Housing and Homelessness, encompassing initiatives such as prevention measures, emergency shelters, assistance with securing permanent housing, and support services aimed at mitigating the adverse health impacts related to being unhoused.

- Homelessness Prevention (Ex: Shelter Diversion, Housing Retention, Eviction Prevention, etc.)
- Research
- Advocacy/Education
- Emergency Shelter
- Supportive Housing
- Transitional Housing
- Finding & securing housing

Hate, Gender-based and Family Violence

Incidents of hate, gender-based, and family violence have continued to rise across Waterloo Region. This grant will provide essential resources to help individuals escape dangerous situations and rebuild their lives in safety, offering them the support they need for a fresh start.

- Crisis Supports/Outreach
- Education/Prevention
- Emergency & Transitional Housing
- Counselling/Recovery

Children & Youth

Empowering children and youth with the support they need to break the cycle of poverty is essential for their long-term success. This includes opportunities for healthy social, emotional, and physical development, to reduce the risk of facing challenges later in life.

- Social Development
- Emotional Development
- Mentorship
- Counselling and Mental Health Support
- Child and Youth Homelessness
- School and Weekend Food Programs
- Education Programs
- Systems Navigation and Advocacy
- Youth Empowerment
- Leadership and Volunteer Opportunities
- Tutoring or academic Support

UWWRC Staff Contact Information

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

- Brooke Ferrara, Specialist, Community Investment bferrara@uwaywrc.ca
519-888-6100 ext. 208
- Brian Kamm, Manager, Community Investment bkamm@uwaywrc.ca
519-888-6100 ext. 209

List of Application Questions

SECTION 1: Eligibility

1.1.1 - Organizations are eligible to complete this application if the organization (or sponsor) meets the following requirements:

- 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 third party 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
- The services outlined in this application align with one of the quarter's designated Issue Areas

SECTION 1 Continued: 1.2 - Fiscal Sponsor Information

1.2.1 - What is the name of the sponsoring organization (If applicable)?:

1.2.2 - Organizations are eligible to qualify as Sponsors if the organization

1.2.3 - Sponsor's Street Address or P.O. Box:

1.2.4 - City/Town:

1.2.5 - Postal Code:

1.2.6 - Organization's Website:

1.2.7 - Charitable Number/Registration Number:

1.3.1 - Key Contact Name:

1.3.2 - Key Contact Position Title:

1.3.3 - Key Contact Email:

1.3.4 - Key Contact Phone Number:

1.4.1 - Sponsored Organization's Mission:

1.4.2 - Audited Financial Statements/Review Engagement:

1.4.3 - Sponsor Letter of Support If applicable:

SECTION 2: Organizational Profile

2.1.1 - What is the name of your organization?:

2.1.2 - Contact Name:

2.1.3 - Contact Position Title:

2.1.4 - Contact Email:

2.1.5 - Contact Phone Number:

2.1.6 - Executive Contact Name

2.2.2 - Executive Contact Position Title:

2.2.3 - Executive Contact Email:

2.2.4 - Executive Contact Phone Number:

2.2.5- Payment email - NEW

The email that would receive the payment transfer if you're application is successful

2.3.1 - Street Address or P.O. Box:

2.3.2 - City/Town:

2.3.3 - Province or Territory:

2.3.4 - Postal Code:

2.3.5 - Organization Website:

2.3.6 - Other Social Media:

2.3.7 - Charitable Number / Incorporation Number:

SECTION 3: Organizational Profile & Areas of Service

This section helps us to capture a picture of the current context of your organization.

NEW QUESTION: 3 - Please select the two subcategories of the IA that best describe your services. You will be limited to 2 selections on the application form.

Community & Social Supports

- Systems Navigation
- Culturally informed services/support
- Settlement Services
- Formal or informal wrap around services
- Cultural Festivals/Community Gatherings
- Restorative Justice
- Community Centers
- Land Based Healing/Education
- Social Enterprise Projects
- Peer Support
- providing space for individuals to connect;

Literacy, Employment Skills, and Assistive Devices

- Adult Literacy Support
- Children and Youth Literacy
- Employment Skills
- Tutoring
- Education or practice of essential life skills
- Assistive Devices

3.1 - What is your organization's mission and mandate? (Max. 50 words):

The description should be consistent with your selected subcategories

3.2 - What are the primary services or activities offered by your organization (Max. 250 Words)?

All services and activities mentioned should align with the Issue Area

3.3.1 - How many people were served by your organization within the last 12 months?

3.3.2 - Top 5 Populations Served (Only Select 5):

- Children and youth: ages 0 to 18
- Children and youth: ages 19 to 29
- People Experiencing Homelessness
- People with low income or living in poverty
- People living with Mental Illness
- People Struggling with Addiction
- Parents or Pregnant People
- People with Disabilities
- People Experiencing Violence
- People involved in the justice system
- Survivors of Abuse
- Indigenous People
- Racialized People
- Black People
- Parents & Pregnant People
- 2SLGBTQ+ People
- Seniors and Elders
- Newcomers
- Refugees
- Other

3.3.3. - Groups not otherwise specified (Optional):

If you selected other, please describe (Max 10 words)

3.3.4 - Do you **physically deliver services in the townships? Yes/No**

SECTION 3.4 Services in the Townships (If Applicable)

United Way aims to make impactful investments across all seven areas within the Region of Waterloo. This section is designed to spotlight organizations that provide direct services in the townships of North Dumfries, Woolwich, Wilmot, and Wellesley

3.4.1 - Which geographic areas do you operate in?

- Woolwich
- Wellesley
- Wilmot
- North Dumfries
- Cambridge
- Kitchener
- Waterloo
- Virtual Service Delivery

3.4.2- Please describe your presence in the Townships (particularly if your main address is elsewhere)

If your main location is outside of the townships, please list your satellite address and the services offered, or explain if mobile/van services make rounds in the townships (Max 300)

3.5 Areas of Service

3.5 - Please select the geographic regions you operate in

- Cambridge
- Kitchener
- Waterloo
- Virtual Service Delivery

3.5.1- Are you affiliated with a provincial or national organization? Yes/No

If you are a local branch of a National or Provincial organization, please select yes

Local Branch Information

3.5.2- Please upload your National branch's Financial Statement/Review Engagement

*IMPORTANT: In the **next** financial section (3.6-3.8), please upload a document that reflects your **local office's financial position** in the audited financial section. This can be anything from a balance sheet, Draft financial statement, or an audited statement if you have one. Please answer all the questions in the next section about your local office.*

3.6 - 3.8: Finances

3.6.1 - What was your total gross annual income last year?

3.6.2 - What percentage of your annual funding is unrestricted?

3.6.3 - Does your organization, or any related organization (e.g. foundation) have an endowment fund, reserve fund or large surplus (Max. 400 Words)?

If yes, please advise us of the board policy, purpose and restrictions on these funds. Please indicate the fund balance(s) at the end of the last fiscal year.

3.6.4 - Major Sources of Revenue: File Upload

3.8.1 - Approximately how many months of operating cash or cash equivalents does your organization currently hold (Max. 50 Words)?

NEW QUESTION: 3.8.2 - Please list any pending grant applications submitted to other funders that may be awarded within the next three months.

This information helps us better understand your organization's ongoing efforts to secure diverse funding sources and build financial sustainability. (Max 300 characters)

NEW REQUIREMENT: 3.8.3 - Audited Financial Statements or Review

Engagement: File Upload

NEW: Financial statements or review engagements **older than March 2025 require additional documentation** to show the current financial position. This can be a draft financial statement, balance sheet, review engagement etc.

Upload a copy of your organization's most recent audited financial statements or review engagement.

For organizations that do not have a charitable number, a statement showing financial position to date is required.

NEW QUESTION: 3.8.4- Would you like to share any additional context to help us better understand your organization's current financial position?

This is an opportunity to highlight any factors that may not be immediately clear in your financial statements. For example, you may wish to explain significant changes in revenue or expenses, new or ending funding relationships, unexpected costs, or recent organizational changes (such as restructuring or expansion). (Max 250 words)

3.9: Strategic Plan

3.9.1 - What are your organization's priorities (Formerly Strategic Plan) (Max. 300 Words)?

You may reference your organization's strategic values, long-term goals, and or fundraising strategy

Think about- what are you trying to do, for whom, and how?

3.9.2 - What is the process for determining these priorities (Max. 250 Words)

Examples: Implementing client feedback, needs assessment, discussing with board of directors.

3.9.3 - Have there been changes to your organization's priorities in the past 12 months? Why or why not (Max. 200 Words)?

Hint- Reference any challenges you've faced, how you've adapted to them, and what is going well.

3.9.4 - Please describe how you incorporate principles of anti-oppression, equity, and inclusion into your service delivery, board, and workplace (Max. 500 Words).

Examples include: Policy change, advocacy, workshops, and trainings. Refer to particular legislation (e.g. AODA) or recommendations (e.g. Truth and Reconciliation Calls to Action) as appropriate

3.9.5 - Upload key training/resource documents related to Equity Diversity & Inclusion (if applicable)

SECTION 4: Proposal

4.1.1 - How much funding are you requesting?

The minimum request for the year is \$20,000. The maximum is \$160,000. Please enter a number without symbols or decimals (ex. 70000).

NEW QUESTION: 4.1.2- What are your current priorities for United Way funding, and how do you plan to use the funds

We understand that priorities may shift over time—if funded, any changes can be reflected in your annual report.

NEW QUESTION: 4.1.3 - How will this funding strengthen your organization's ability to carry out its mission, respond to community needs, or increase your overall impact?

By design, GOS is flexible and can be directed to emerging issues and help cover admin and operational expenses. With this in mind, we ask that you share your overall impact as an organization, and how our flexible funding would support that work.

4.1.4 - Please explain how your proposal would change if you were to receive 80%, 50%, or 25% of your funding request. What changes would you have to make to the use of funding? (Max. 500 Words).

Please provide a brief summary of how your proposal will change based on scenarios where a portion of requested funds is provided for the year i.e. at 80%, 50% and 25% of funding as requested in 4.1.1. (max 500 words)

The funds we have available vary each quarter, so we can not guarantee we will be able to fulfill the full funding request.

4.1.5 - Does your organization qualify for The Tomorrow Fund?

*The Tomorrow Fund is a donor designation of 40,000, to support programs and organizations that serve the communities of **Cambridge and North Dumfries**, with a focus on addressing **emerging or long-term community needs**.*

*Priority will be given to **new or innovative initiatives**, as well as those that focus on **capacity building and long-term sustainability**.*

This funding opportunity is made possible thanks to the generosity of donors who have chosen to leave a lasting legacy through United Way.

4.2 - 4.3: Proposal Continued – Challenges, Networks, & Evaluation

4.2.1 - Which organizations do you collaborate or partner with? Please expand on your top 3-5 partnerships (Max. 350 Words).

Examples include: Knowledge sharing, mentorship, consulting, networks, planning tables, and referrals (to reduce waitlists, or to organizations with other expertise):

4.3.1 - How do you track and measure the effectiveness of your organization? (Max. 150 Words)

Please be specific, including the methods used (e.g., stats, surveys, counts of service, staff observations) Avoid using measures of client satisfaction.

4.3.2 - Please provide examples or stories that demonstrate your organization's impact. (Max. 500 Words)

This will help the volunteer reviewer better understand the importance of the work you do.

SECTION 5: Application Sharing – Permissions & Exclusions

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.

EXCLUSIONS to Sharing Reporting Information.

SECTION 6: Authorization & Confirmation

Please upload your authorization and confirmation file here.