

# Community Impact Investment

2018-2020 Funding Cycle

## Funding Principles

United Way fights for the health, education, and financial stability of every person in Benton and Franklin Counties. Donors and partners entrust their resources to United Way to strategically invest in solutions that create long-term community change.

United Way adheres to the following guiding principles in its community investment process:

1. United Way community investments focus on programs that achieve measurable results – both at the community-level and at the program-level – as identified in the Results Framework. Organizations applying for United Way funding must demonstrate measurable results in alignment with the Results Framework.
2. United Way serves all of Benton and Franklin Counties. United Way prioritizes support for services to the most vulnerable and underserved people.
3. United Way funds programs that demonstrate strong support from other funding sources.
4. United Way funds programs that collaborate with other private and public partners to enhance the delivery of services.
5. Organizations must demonstrate strong financial accountability and organizational governance to ensure responsible stewardship of funds.
6. United Way funds high-performing programs. United Way funding can be reduced or discontinued should a funded program demonstrate insufficient outcome achievement, reporting noncompliance, material deficiencies, or other noncompliance.
7. Second year funding is contingent on the result of United Way's annual fundraising campaign.

**Note:** *United Way typically receives four dollars in requests for funds for every dollar available. Hence, the process for funding is highly competitive. Current or past funding by United Way does not guarantee future funding.*

## Impact Areas

Each application for funding must demonstrate alignment with United Way's funding principles and one of the five impact areas in the Results Framework ([download PDF](#)):

Childhood Success	Children (birth to 3 <sup>rd</sup> grade) enter kindergarten ready and transition successfully into elementary school
Youth Success	Youth (grades K-12) gain the knowledge and skills needed to become contributing members of the community
Financial Stability	Individuals and families improve their socio-economic status
Health	Individuals and families have access to healthcare and improve their quality of life
Basic Needs	Individuals and families have access to food, water, shelter, safety, and information in times of need

For more information about how to align with these impact areas, download and refer to the Results Framework ([download PDF](#)). Applicants are required to select results measurements from those identified in the Results Framework.

## Funding Parameters

### Funding Levels

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Grants are awarded at two levels depending on the financial practices of the applying organization:

- **Program Grants (90% of available funds):** Program grants support organizations that submit audited or reviewed financial statements (see [Program Grant Eligibility](#)). Program grants range from \$10,000 to \$60,000 per year for two years.
- **Capacity Grants (10% of available funds):** Capacity grants support organizations with less than \$250,000 total annual gross income (see [Capacity Grant Eligibility](#)). Capacity grants range from \$1,500 to \$5,000 per year for two years.

### Number of Applications

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Eligible organizations may apply for funding of up to three programs per agency.

## Minimum Eligibility

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Organizations must meet the eligibility requirements to be considered (see [Eligibility](#)). During the online application process, an eligibility form must be completed. If eligibility is met, the organization will be permitted to access the full application. If eligibility is not met, the organization will be notified that the request to apply has been denied.

## Online Submission

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Applications are submitted through the e-CImpact agency portal (see [Application Instructions](#)). Only applications submitted through e-CImpact portal by the application due date will be accepted. Technical assistance may not be available at the last minute. Allow adequate time to complete the online forms and submit them well ahead of the deadline.

A Word version of the application is available for download in the e-CImpact agency portal Resource Center. This is only to facilitate drafting of responses. The Word application will not be accepted as a form of submission.

## Minimum & Maximum Award

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Each program application must request an amount of funding within the stated ranges for either the Program Grant or Capacity Grant (see [Funding Levels](#)). United Way targets funding applications within a range of 60% to 100% of the requested amount.

## Reporting

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Grantees are required to report every six months via the e-CImpact agency portal.

- **Mid-year:** Short status update comprised of narrative responses only. The intent of this report is to briefly update United Way on progress, changes, and success stories.
- **Year-end:** Comprehensive report for year-end performance evaluation. In addition to narrative responses, agencies will report actual performance numbers and client demographic data. The year-end reports are evaluated by United Way board members and volunteers. Continued funding is contingent on the results of these evaluations.

## Funds Disbursement

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Approved first year funds will be disbursed July 1, 2018 – June 30, 2019. Approved second year funds will be disbursed July 1, 2019 – June 30, 2020. Second year funding is contingent on the result of United Way's annual fundraising campaign and satisfactory performance on mid-year and year-end reports.

Program Grant funds are disbursed monthly. Capacity Grant funds are disbursed 50% in the first month after the funding agreement is complete, and 50% upon satisfactory completion of the mid-year report (approximately 7 months after the first payment).

## Eligibility

### Program Grant Eligibility

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To be eligible for program grants, an organization must meet the following criteria:

1. Provides health or human services to people in Benton and/or Franklin County, Washington, USA;
2. Registered 501(c)(3) not-for-profit organization in good standing with the IRS;
3. Registered with the Washington State Secretary of State as a charitable organization;
4. Complies annually with the USA PATRIOT Act;
5. Does not engage in discrimination because of race, color, national or ethnic origin, age, religion or creed, disability, sex, sexual orientation, gender identity or expression, veteran status, or any other characteristic protected under applicable federal or state law in the delivery of services;
6. Has an active board of directors that meets with a quorum at least quarterly;
7. Prepares financial statements at least quarterly which are reviewed and approved by the board of directors;
8. Submits to United Way an audited or reviewed financial statement for the 2016 fiscal year or more recent, following the [BBB Wise Giving Alliance guidelines](#) for audit reports (Standard #11). When total annual gross income exceeds \$500,000, this statement should be [audited](#) in accordance with generally accepted auditing standards by an independent certified public accountant who is licensed in Washington State. When total annual gross income is less than \$500,000, it is sufficient for this statement to be [reviewed](#) by an independent certified public accountant who is licensed in Washington State.
9. Files a Form 990 or 990-EZ with the Internal Revenue Service annually if gross receipts exceed \$50,000, or files a Form 990-N Electronic Notice (e-Postcard) if gross receipts are at or below \$50,000;

### Capacity Grant Eligibility

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To be eligible for capacity grants, an organization must meet the following criteria:

1. Provides health or human services to people in Benton and/or Franklin County, Washington, USA;
2. Registered 501(c)(3) not-for-profit organization in good standing with the IRS;
3. Registered with the Washington State Secretary of State as a charitable organization;
4. Complies annually with the USA PATRIOT Act;
5. Does not engage in discrimination because of race, color, national or ethnic origin, age, religion or creed, disability, sex, sexual orientation, gender identity or expression, veteran status, or any other characteristic protected under applicable federal or state law in the delivery of services;
6. Has an active board of directors that meets with a quorum at least quarterly;

7. Prepares financial statements at least quarterly which are reviewed and approved by the board of directors;
8. Total annual gross income is less than \$250,000;
9. Submits to United Way a financial statement for the 2016 fiscal year or more recent, following the [BBB Wise Giving Alliance guidelines](#) for organizations with less than \$250,000 total annual gross income (Standard #11). It is sufficient for this statement to be internally produced. The statement should include a balance sheet, statement of support, revenue and expenses, notes, and any other appropriate schedules.
10. Files a Form 990 or 990-EZ with the Internal Revenue Service annually if gross receipts exceed \$50,000, or files a Form 990-N Electronic Notice (e-Postcard) if gross receipts are at or below \$50,000;

## Schedule

### APPLY

Application available on e-CImpact agency portal .....	January 12
Information meeting #1 .....	January 19, 1:00 – 2:00 pm @ United Way
Information meeting #2 .....	January 23, 3:00 – 4:00 pm @ United Way
<b>Program Grant deadline .....</b>	<b>February 28, by 11:45 pm</b>
<b>Capacity Grant deadline .....</b>	<b>March 15, by 4:30pm</b>

### REVIEW

United Way staff evaluate applications and verify eligibility .....	March 1 – March 30
Volunteers evaluate applications .....	April 2 – April 13
Volunteers meet to determine finalists and awards .....	April 16 – April 20
Site visits to finalist agencies .....	April 23 – May 4

### APPROVAL

United Way Community Impact Committee approves funding recommendation .....	May 8
United Way Board of Directors approves funding recommendation.....	May 29

### AWARD

Award letters and contracts issued .....	May 30
Fully executed contracts due .....	June 29, by 12:00 pm
Payments begin.....	July 15

# Application Instructions

## Apply Online

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**Only applications submitted through the e-CImpact agency portal by the due date will be accepted.**

1. Go to the agency portal at <https://agency.e-cimpact.com/login.aspx?org=51090U>
2. If you already have an e-CImpact account:
  - a. Sign in to your account
  - b. Review and update your agency profile
  - c. Click **Request Grant Application** in the left-side navigation
  - d. Select from the list of grants
  - e. Complete the **Eligibility Screening** to access the application
3. If you do not already have an e-CImpact account:
  - a. Click the button to create a new account
  - b. Follow the steps to create your agency profile
  - c. Select from the list of grants
  - d. Complete the **Eligibility Screening** form to access the application
4. Follow the on-screen instructions to submit up to three program proposals
5. See the **Resource Center** in e-CImpact for a detailed training manual and application resources

## Required Attachments

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In addition to the application forms, the following attachments are required:

- Most recent IRS Form 990
- Most recent balance sheet reviewed by the board
- Most recent annual financial statement, including a balance sheet, statement of support, revenue and expenses, notes, appropriate schedules, and any Required Communication to the Board
- Organization's statement or policy of non-discrimination for delivery of client services

## Need Help?

**If you have any questions, we're here to help!**

Email [grants@uwbfco.org](mailto:grants@uwbfco.org) or call 509-783-4102 to request technical assistance or get answers to questions about the application.