UNITED WAY OF THE RIVER CITIES COMMUNITY IMPACT GUIDELINES AND POLICIES

ABOUT UNITED WAY OF THE RIVER CITIES

The mission of United Way of the River Cities (UWRC) is to connect our community with resources to reduce poverty and improve lives. We envision a community where everyone has the tools and opportunity to thrive. Our work focuses on the **Youth Opportunity, Financial Security, Healthy Community,** and **basic needs** of our six-county service area (Cabell, Lincoln, Mason and Wayne, WV, Gallia and Lawrence Co. OH)

United Way of the River Cities' Community Impact Approach

1. Providing in-house Initiatives and Programs
2. Convening coalitions and community partnerships
3. Funding programs that align with our community goals

INTERNALLY MANAGED PROGRAMS – These are activities that are: Funded directly by UWRC and/or outside grants written by UWRC; Managed by UWRC staff; Produce outcomes and offer a service or product
Brain Under Construction Zone (BUCZ) – Materials and training are delivered to parents and staff at area child-serving locations to promote the importance of healthy brain development in early childhood.
Volunteer Income Tax Assistance (VITA) – Free tax preparation for individuals and tax season preparedness training
UnitedWeVolunteer.org - A virtual volunteer center offering a place for volunteers and agencies to connect – also coordinates offline events such as special projects, employer engagement, and workshops
COALITIONS/COLLABORATIONS – Community Groups that are led or co-led by UWRC that work to solve community problems and bring about change
Education Coalition – A collaborative group whose goal is to motivate the community to increase student success
Free Tax Coalition – A group of organizations/businesses committed to improving Financial Security for low to moderate income residents- each member hosts a VITA tax prep site.
GRANTS
Safety-net Grants - Awarded to programs that provide short-term, emergency assistance with basic needs
Impact Grants - Awarded to programs that address critical issues in the focus areas of education, Financial Security, and health
The Big Cover-Up Grant – Awards matching funds for student-led winter clothing and food projects to benefit students in their district.

ABOUT THE COMMUNITY IMPACT COUNCIL

UWRC's grant process is driven by the **Community Impact Council (CIC).** Staff serve an organizational function but grant review and allocation recommendations are decided by teams of community members.

Community Impact Council Duties:

- Ensuring that UWRC Community Impact Agenda and Goals are aligned with the needs of the community and donors
- Determining UWRC's Strategies for Change under the four Focus Areas of Health, Education, Financial Security and Basic Needs via a community needs assessment every four years
- Ensure that all 3 of UWRC's Community Impact approaches align and work toward our Community Goals
- Developing and reviewing Community Impact policies and guidelines
- Reviewing grant applications scored by the Focus Area Subcommittees
- Creating grant funding recommendations that are sent to the UWRC board for approval

The Community Impact Council shall be comprised of:

- Five (5) UWRC Board Members
- Four (4) Community Members

The recruitment of council members will consider the following:

- Representation across our service area
- Geographically underserved areas
- Equity, inclusion, and diversity
- Personal experience and background

Council members will serve terms of two years. After the first term, members may elect to serve an additional term. After two consecutive terms on the council, members must wait two years before being eligible to serve again.

COMMUNITY GOALS AND STRATEGIES FOR CHANGES

The Community Goals and Strategies for Change that drive UWRC's funding are reevaluated every four years using current data and community input.

Community Goals for United Way of the River Cities are:

Youth Opportunity - To create a thriving community, we must support families and students throughout the entire educational process.

Healthy Community - To create a thriving community, we must increase the opportunities for healthy lifestyle choices and promote overall health and wellbeing.

Financial Security - To create a thriving community, we must help families overcome barriers to opportunity, develop economic mobility and build generational resilience.

Strategies for Change

The currently identified **Strategies for Change** within our four focus areas are:

Youth Opportunity

- Improve family ability to support social and language development in children
- Provide character development and empowerment opportunities for youth (ages 4-24)

Healthy Community

- Increase access to primary, behavioral, vision & dental health care services
- Increase opportunities for wellness and access to prevention

Financial Security

- Increase support of collaborative, workforce training programs
- Reduce barriers to Financial Security including financial literacy education and access to services

Basic needs are updated as needed and are responsive to the needs of our most vulnerable citizens.

- Safe shelter
- Food
- Clothing
- Personal care items
- Infant essentials; defined as *car seats, diapers/wipes, formula/baby food, and safe sleep accommodations*
- Prescription medication
- Low- or no-cost healthcare
- Utilities/rent assistance
- Transportation to access any of the above

ALICE (Asset Limited, Income Constrained, Employed) remains our target population for funded programs and services. ALICE Essentials, as listed here, will be considered in addressing community needs and prioritizing funding proposals, and should be addressed when completing any funding requests.

Safe, Affordable Housing
Impact on ALICE: Improved health through safer environments and decreased stress, improved educational performance and outcomes for children, greater stability for household members, a means to build wealth for homeowners
Community Impact: Less traffic, lower health care costs, better maintained housing stock, lower crime rates, less spending on homelessness/social services

Quality Child Care and Education
Impact on ALICE: Improved academic performance, higher lifetime earnings, higher graduation rates, improved job stability/access for parents, better health
Community Impact: Decreased racial/ethnic and socioeconomic performance gaps, decreased income disparities, high return on investment (especially for early childhood education)

Adequate Food
Impact on ALICE: Decreased food insecurity, improved health, decreased likelihood of developmental delays and behavioral problems in school
Community Impact: Lower health care costs, less spending on emergency food services

Reliable Transportation
Impact on ALICE: Improved access to job opportunities, school and childcare, health care, retail markets, social services, and support systems (friends, family, faith communities)
Community Impact: Fewer high emissions vehicles on the road, more diverse labor market, decreased income disparities

Quality Health Care
Impact on ALICE: Better mental and physical health (including increased life expectancy), improved access to preventive care, fewer missed days of work/ school, decreased need for emergency services
Community Impact: Decreased health care spending, fewer communicable diseases, improved workplace productivity, decreased wealth health gap

Reliable Technology
Impact on ALICE: Improved access to job opportunities, expanded access to health information and telehealth services, increased job, and academic performance
Community Impact: Decreased “digital divide” in access to technology by income, increased opportunities for civic participation

Savings
Impact on ALICE: Ability to withstand emergencies without impacting long-term Financial Security and greater asset accumulation over time
Community Impact: Less spending on emergency health, food, and senior services

ELIGIBILITY FOR FUNDING AND TYPES OF GRANTS

To be eligible to apply for a UWRC grant, a program **must**:

- Be coordinated by an incorporated nonprofit organization and have tax-exempt status under the Internal Revenue Service code, unless faith-based (e.g., church).
- Have a Board of Directors that is an active, representative voluntary governing body, with regular meetings and is responsible for developing its mission, determining its strategic direction, and providing oversight.
- Have up-to-date, current bylaws, or guidelines, by which the organization operates.
- File an IRS form 990, including schedule A or 990 EZ, or can document the circumstances under which the 990 filing is waived.
- Provide a current budget for the entire organization.
- Submit a current annual audit ($500,000 or above), financial review ($200,000 - $499,999), or the most-recent Board-approved Fiscal Year-End statement of Financial Position and Statement of Activity comparative to the previous year ($199,999 or below), depending upon the organization's total revenue. Submit an organizational chart and list of internal controls (Faith-based organizations only).
- Physically located in one or more of the counties in UWRC service area – Cabell, Wayne, Lincoln, Mason counties in West Virginia and Gallia and Lawrence Counties, Ohio.
- Have significant experience in the area for which it has submitted an application. The organization has a standing in the community and develops relationships to affect community change.
- Must be able to provide. At minimum data on, the number of people served and basic client demographic information, including county of residence.
- Have the mechanisms and capacity for regularly reporting outputs and persons served.
- Demonstrate reasonable efficiency in program management and adequacy of resources, both in materials and in personnel (voluntary and paid) to sustain a quality level of service.
- If a collaborative effort, submit a statement from each identified partner listing their roles and responsibilities in the effort.
- Agencies or programs that have unresolved compliance issues with previous UWRC grants are not eligible.
- Incomplete or late submissions will not be accepted.

UNITED WAY OF THE RIVER CITIES DOES NOT TYPICALLY FUND:

- Arts and culture
- Sports teams and recreation
- Capital campaigns or projects
- Environmental projects or organizations
- Direct religious activities of religious groups or organizations
- Agencies or programs that require changes to our MOA.
- Direct religious activities of religious groups or organizations
- Scholarships and individuals
- Programs run by State Agencies including Higher Education and Public School

While these causes are important for creating vibrant communities, they do not fit the focus of UWRC's Community Impact work. However, we welcome any non-profit to use our online volunteer center UnitedWeVolunteer.org to recruit, engage and track volunteers.

IMPACT GRANTS - Impact Grants are awarded to programs that address one of the critical issues in the **focus areas of healthy community, youth opportunity, Financial Security.** Impact programs are expected to demonstrate, track and report outcomes. Grant cycle is two years. **Grant range**: $7,500 to $35,000

SAFETY NET GRANTS FOR BASIC NEEDS - Safety Net Grants are awarded annually to programs that provide short-term, emergency assistance with Basic Needs. **Grant Range:** $4,000 to $20,000

Safety Net Grants

GRANT DESCRIPTION

Safety-net Grants are awarded each year to programs that provide short-term assistance with basic needs defined as: **Safe shelter, Food, Clothing, Personal care items, Infant essentials, Prescription medication, Low- or no-cost healthcare, Utilities/rent assistance,** and **Transportation to access any of these services.**

Programs must be physically located in **Cabell**, **Lincoln**, **Mason** and/or **Wayne counties** in **West Virginia** or **Gallia and Lawrence County, Ohio.**

All organizations requesting safety net funding must complete a Letter of Intent (LOI). If this is a collaborative effort, the lead 501(c)3 organization should complete the LOI. Applicants meeting the required criteria will be notified by email, at which point the organization will be invited to submit a full grant application.

Grant Range: $4,000 to $20,000
Grant Term: January 1 – December 31

FINANCIAL REPORTING REQUIREMENTS

Nonprofit organizations

- **If an agency's total revenue is $500,000 or more**, the agency shall submit its most recent Form 990 and its most recent independent financial audit conducted by a Certified Public Accountant and in conformity with generally accepted accounting principles.
- **If an agency's total revenue is between $200,000 and $499,999**, the agency is required to submit its most recent Form 990 and an independent financial audit, or an independent financial review conducted by a Certified Public Accountant.
- **If an agency's total revenue is less than $200,000**, the agency shall submit its most recent Fiscal Year End statement of Financial Position and Statement of Activity comparative to the previous year and duly approved by its Board of Directors.

Faith-based Organizations

- Current Form 990 (or a statement of exemption on letterhead)
- Charitable registration letter for state of OH or WV (or a statement of exemption on letterhead)
- Organizational chart
- List of internal controls

FUNDING PROCESS

- All application materials are submitted through United Way of the River Cities' website using Foundant.
- Process begins with **letter of intent (LOI)**
- Those eligible to apply will be notified and a **mandatory grantee meeting** is held before the application opens
- **UWRC Board approves recommendations** at its December meeting
- Funding year is **January 1 – December 31**.

EXPENSES

All Expenses Must Be

- Allowable
- Allocable
- Reasonable

Allowable Expenses

Direct Costs to provide:

- Clothing
- Food- in the form of groceries or meals (meals can be congregate, delivered, or to-go).
- Infant essentials; defined as car seats, diapers/wipes, formula/baby food, and safe sleep accommodations
- Low- or no-cost healthcare
- Personal care items
- Prescription medication
- Safe shelter
- Transportation to access any of the above
- Utilities/rent assistance
- Indirect costs are limited to 10% of the amount of the grant.*

Unallowable expenses

- Alcohol
- Donations/Lobbying/Fines/Interest
- Entertainment
- Expenses related to applying for United Way funding and for reporting and billing to UWRC
- General administrative equipment/supplies
- Sales Tax (except when unavoidable)

***Indirect costs**: General overhead and administration expenses that support the entire operations of an organization and that may be shared across projects or programs.*

THE LETTER OF INTENT (LOI) REQUIREMENTS

The LOI is a short concept paper that outlines the project or program and contains the following components:

1. **Eligibility Requirements**
   - Must answer yes to all requirements
2. **Applicant Information**
   - Organization
   - Address
   - Website
   - Primary Contact and title, phone, email, fax
   - Alternate Contact and title, phone, email, fax
3. **Organization Background**
   - Please write a brief description of the organization including a mission statement and how long the program has been operating.
4. **Amount Requested**
5. **Expected Results**
   - Estimate the total number of people that will participate and/or benefit from the program.
6. **Counties Served**
7. **Basic Needs to Be Met**
8. **Executive Summary and Statement of Need**
   - Provide a brief summary of your program and description of need for the program or services you are proposing.

REQUIRED ATTACHMENTS

- **Current IRS Form 990/990 EZ**
- **The appropriate most recent financial reporting as described below:**
  - If an agency's total revenue is $500,000 or more the agency shall submit an independent financial audit conducted by a Certified Public Accountant and in conformity with generally accepted accounting principles.
  - If an agency's total revenue is between $200,000 and $499,999, the agency shall submit an independent financial audit or independent financial review conducted by a Certified Public Accountant.
  - If an agency's total revenue is less than $200,000, the agency shall submit its most recent Fiscal Year End statement of Financial Position and Statement of Activity comparative to the previous year, duly approved by its Board of Directors.
- **Charitable Registration Letter for state of WV or Ohio**
- **For Faith Based Organizations:**
  - Current Form 990 (or a statement of exemption on letterhead)
  - Charitable registration letter for state of OH or WV (or a statement of exemption on letterhead)
  - Organizational chart
  - List of internal controls

See Appendix I for the Letter of Intent Review Guidelines. This is what the volunteer reviewers will be considering when reviewing your LOI.

APPLICATION REQUIREMENTS

PROGRAM INFORMATION

1. **Program Objectives**
   - Briefly describe the community and the United Way Strategy for Change your program is designed to address. Include pertinent statistical and demographic information.
2. **Program Activities and Timelines**
   - Indicate the primary or major types of activities that will occur to carry out the project and their anticipated start and end dates.
3. **Program Evaluation**
   - How will you measure and evaluate the overall success of your program? How will you evaluate the results experienced by participants?

TARGET AUDIENCE – See Appendix II for the full list of required age range and demographics

1. **Participants**
   - Describe who will participate in and/or benefit from the program. Include descriptions of the clients and the conditions or behavior they experience. Also include the scope of the problem(s) this program seeks to address. Provide supporting local data.
2. **Age Range**
   - Select the age of the audiences who will benefit from the program that you are able to track and report – must be able to track at least one.
3. **Demographics**
   - Identify the demographics of the participants that you are able to track and report – must be able to track at least two.

MEASUREMENT REQUIREMENTS

Safe shelter
# of nights provided
Total clients served

Food
# of meals provided
Total clients served

Clothing
# of items provided
Total clients served

Personal care items
# of items provided
Total clients served

Infant essentials; *defined as car seats, diapers/wipes, formula/baby food, and safe sleep accommodations*
# of items provided
Total clients served

Prescription medication
# of prescriptions provided
Total clients served

Low- or no-cost healthcare
# of appointments provided
Total clients served

Utilities/rent assistance
Total funds disbursed
Total clients served

Transportation to access any of the above
# of trips/passes provided
Total clients served

BUDGET - See Appendix III for tips on writing a grant budget

1. **Budget Narrative**
   - The budget narrative is your opportunity to clarify the program budget for reviewers. At a minimum, you must provide the following:
   - Explanation if your program has expense on the line item to provide direct financial assistance to clients.
   - If United Way is not able to fund the full amount of the request, how will this affect the program?
2. **Budget Worksheet**

COUNTER-TERRORISM FORM

- In compliance with the spirit and intent of the USA PATRIOT Act and other Counter Terrorism Laws, UWRC requires that each funded agency certify that it is in compliance with the UWRC the United Way Worldwide's compliance program.

DIGITAL SIGNATURE from CEO or Director

RUBRIC FOR SAFETY-NET GRANTS

1. **Overall, does this program clearly address the Basic Needs it plans to meet?**

   Strong – The application clearly explains how and why they chose the Basic Needs that they are addressing. It is obvious that the applicant has become familiar with the Community Needs Assessment and has used that data and other data to support the need for their program in their community. The program has collaborative partners who are involved in the overall success and delivery of the program, or they have a clear explanation of why there are no collaborative partners.

   Average - The application explains the Basic Needs that they are addressing. There is statistical data to support the need for the program, but the need either is not clearly defined or connected to the Community Needs Assessment. They have some collaborative partners, or they have explained why no partners exist.

   Weak - The application does not clearly explain how or why they chose the Basic Needs that they are addressing. The statistical data is either missing, does not support the need for the program, or the program does not adequately meet the need they identify. There are no collaborative partners and does not adequately explain why.

2. **Do the Measurements align with the Basic Needs the program is designed to address?**

   Strong – The **Measurements** clearly align with the **Program Objectives** and seem logical, attainable and in line with their request.

   Average – The **Measurements** align with the **Program Objectives**.

   Weak – The **Measurements** do not clearly align with the **Program Objectives** do not seem logical, attainable and in line with their request.

3. **Is the Target Audience clearly described, reflecting the demographics of the community in which they work, and address an audience mentioned in the Community Needs Assessment (if applicable)?**
   Note: *If the clients are not in the United Way service area, the program is not eligible.*

   Strong – The **Target Audience** is very clear. They are in the United Way service area, there is good supporting data, and the program is able to show that they will be able to collect demographic data. The **Participants** section gives a good sense of who this program will serve, why they are being served, and the challenges they are experiencing

   Average – The **Target Audience** is stated. They are in the United Way service area, there is supporting data, and the program should be able to collect demographic data. The **Participants** section explains who this program will serve and why they are being served.

   Weak – The **Target Audience** is mentioned. They are in the United Way service area, there is either no supporting data or the data is insufficient. It is unclear if the program will be able to collect demographic

data. The **Participants** section does not clearly explain who this program will serve or why they are being served.

4. **Does the Program Budget and Budget Narrative make sense? Is it accurate and logical? Does United Way's contribution have a tangible and clear impact on service delivery?**

   Strong – The budget is well thought out and accurate. All sources of income are listed, and all expenses seem reasonable. United Way funds play an important role in the delivery of the program so that we can ensure our funding has an impact. The **Budget Narrative** clearly explains how the program would be affected if the full funding amount is not awarded and changes to potential outcomes and service delivery are addressed. If this is a new program, United Way funds are the catalyst for the program. If this is an expansion of services, United Way funds are critical to that expansion.

   Average – The budget is accurate. All sources of income are listed, and all expenses seem reasonable. United Way funds play a role in the impact the program will have. The **Budget Narrative** explains how the program would be affected if the full funding amount is not awarded and changes to potential outcomes are addressed. It is clear how funds will be used.

   Weak – The budget has errors and/or missing information. Sources of income are not clearly listed and/or expenses do not seem reasonable. It is not obvious how United Way funds play a role in the impact the program will have. The **Budget Narrative** does not fully explain how the program would be affected if the full funding amount is not awarded. It may or may not be clear how funds will be used.

Impact Grants

GRANT DESCRIPTION

Impact Grants are awarded to programs designed to drive change around UWRC's **Strategies for Change**. Programs must be located in **Cabell**, **Lincoln**, **Mason** and/or **Wayne counties** in **West Virginia** or **Gallia** and/or **Lawrence Counties, Ohio.**

All organizations requesting impact grant funding must complete a Letter of Intent (LOI). If this is a collaborative effort, the lead 501(c)3 organization should complete the LOI. Applicants meeting the required criteria will be notified by email, at which point the organization will be invited to submit a full grant application.

Grant Range: $7,500 to $35,000
Grant Term: January 1-December 31 (Two years of funding)

Strategies for Change and Required Measures

Identified by a group of community volunteers, these **Strategies for Change** guide our work and are organized around the focus areas of **youth opportunity**, **Financial Security**, **and healthy community**. In order to be eligible for impact funding, an agency must propose a program that demonstrates outcomes related to one of these issues.

Additionally, all programs must choose at least one **Strengthen Communities - Direct Supports and Services** performance measure and at least one **Change Lives – Client Outcomes** performance measure for reporting purposes.

		REQUIRED PERFORMANCE MEASURES (AT LEAST 1 FROM EACH COLUMN)	
FOCUS AREA	**STRATEGIES FOR CHANGE**	**STRENGTHEN COMMUNITIES DIRECT SUPPORTS AND SERVICES**	**CHANGE LIVES CLIENT OUTCOMES**
Youth Opportunity	**Improve family ability to support social and language development in children**	▪ # of children (ages 0-5) enrolled in high-quality early childhood programs ▪ # of children (K-3) served receiving literacy supports in school and/or community-based out-of-school time programs and/or receive individualized supports ▪ # of families, caregivers served that are provided with information, resources, tools, trainings, and/or teaching skills	▪ % of children (0-5) served who achieve developmental milestones ▪ % of children who demonstrate increased literacy skills ▪ % of parents/caregivers that demonstrate an increase in knowledge or skill
	Provide character development and empowerment opportunities for youth (ages 4 - 24)	▪ # of youth served who participate in school and/or community-based out-of-school time programs and/or receive individualized supports ▪ #of youth served who receive life or job skills training	▪ % of youth who demonstrate behavior change related to positive progression through services provided (improved attendance, grades, behavior etc.) ▪ % of youth who achieve completion of personal goals

FOCUS AREA	STRATEGIES FOR CHANGE	REQUIRED PERFORMANCE MEASURES (AT LEAST 1 FROM EACH COLUMN) STRENGTHEN COMMUNITIES DIRECT SUPPORTS AND SERVICES	 CHANGE LIVES CLIENT OUTCOMES
HEALTHY COMMUNITY	**Increase access to primary, behavioral, vision & dental health care services**	▪ # of individuals served with access to healthcare services and supports ▪ # of individuals with access to health care insurance	▪ % of individuals served who eat healthier, increase physical activity, and/or move towards a healthy weight ▪ % of individuals who report their health was maintained or improved
	Increase opportunities for wellness and access to prevention	▪ # of individuals successfully completing health/wellness/education/prevention programs ▪ # of community partners engaged in health/wellness/education/prevention programs	▪ % of individuals with increased access/knowledge/engagement in wellness/prevention opportunities ▪ % of individuals who adopted health lifestyles or avoided risky behaviors, etc.
FOCUS AREA	**STRATEGIES FOR CHANGE**	**REQUIRED PERFORMANCE MEASURES (AT LEAST 1 FROM EACH COLUMN) STRENGTHEN COMMUNITIES DIRECT SUPPORTS AND SERVICES**	** CHANGE LIVES CLIENT OUTCOMES**
FINANCIAL SECURITY	**Increase support of collaborative, workforce training programs**	▪ # of individuals who achieve a GED or gains in educational functional levels ▪ # of individuals gaining a training certificate or similar occupational skills training achievement	▪ % of individuals served who gain employment or are placed in job internships ▪ % of individuals served who increase their wages ▪ % of individuals served who earn job-relevant licenses, certificates, and/or credentials
	Reduce barriers to Financial Security including financial literacy education and access to services	▪ # of individuals who complete financial literacy classes or life skill trainings ▪ # of individuals served who access affordable housing, financial products, and services	▪ % of individuals who successfully complete their personal goals ▪ % of individuals whose self-sufficiency status has improved

FINANCIAL REPORTING REQUIREMENTS

Nonprofit organizations

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- **If an agency's total revenue is between $200,000 and $499,999**, the agency is required to submit its most recent Form 990 and an independent financial audit, or an independent financial review conducted by a Certified Public Accountant.
- **If an agency's total revenue is less than $200,000**, the agency shall submit its most recent Fiscal Year End statement of Financial Position and Statement of Activity comparative to the previous year and duly approved by its Board of Directors.

Faith-based Organizations

- Current Form 990 (or a statement of exemption on letterhead)
- Charitable registration letter for state of OH or WV (or a statement of exemption on letterhead)
- Organizational chart
- List of internal controls

FUNDING PROCESS

- All application materials are submitted through United Way of the River Cities' website using Foundant.
- Process begins with **letter of intent (LOI)**
- Those eligible to apply will be notified and a **mandatory grantee meeting** is held before the application opens
- **UWRC Board approves recommendations** at its December meeting

EXPENSES

All Expenses Must Be

- Allowable
- Allocable
- Reasonable

Allowable expenses

- Directly associated costs to achieve positive outcomes for UWRC identified Strategies for Change
- Indirect* costs are limited to 10% of the amount of the grant.

Unallowable expenses

- Expenses related to applying for United Way funding and for reporting and billing to UWRC
- Alcohol
- Entertainment
- General administrative equipment/supplies
- Sales Tax (except when unavoidable)
- Donations/Lobbying/Fines/Interest

***Indirect costs**: General overhead and administration expenses that support the entire operations of an organization and that may be shared across projects or programs.*

THE LETTER OF INTENT (LOI) REQUIREMENTS

The LOI is a short concept paper that outlines the project or program and contains the following components:

1. **Eligibility Requirements**
   - Must answer yes to all requirements
2. **Applicant Information**
   - Organization
   - Address
   - Phone
   - Website
   - Primary Contact and title, phone, email, fax
   - Alternate Contact and title, phone, email, fax
3. **Organization Background**
   - Please write a brief description of the organization including mission statement and how long the program has been operating.
4. **Amount Requested**
5. **Expected Results**
   - Estimate the total number of people that will participate and/or benefit from the program.
6. **Counties Served**
7. **Strategies for Change the program will use**
8. **Executive Summary and Statement of Need**
   - Provide a brief summary of your program and description of need for the program or services you are proposing.

REQUIRED ATTACHMENTS

1. **Current IRS Form 990/990 EZ**
2. **The appropriate financial reporting as described below:**
   - If an agency's total revenue is $500,000 or more the agency shall submit an independent financial audit conducted by a Certified Public Accountant and in conformity with generally accepted accounting principles.
   - If an agency's total revenue is between $200,000 and $499,999, the agency shall submit an independent financial audit or independent financial review conducted by a Certified Public Accountant.
   - If an agency's total revenue is less than $200,000, the agency shall submit its most recent Fiscal Year End statement of Financial Position and Statement of Activity comparative to the previous year, duly approved by its Board of Directors.
3. **Charitable Registration Letter for state of WV or Ohio**
4. **<u>For Faith Based Organizations:</u>**
   - Current Form 990 (or a statement of exemption on letterhead)
   - Charitable registration letter for state of OH or WV (or a statement of exemption on letterhead)
   - Organizational chart
   - List of internal controls

See Appendix I for the Letter of Intent Review Guidelines. This is what the volunteer reviewers will be considering when reviewing your LOI.

APPLICATION REQUIREMENTS

PROJECT INFORMATION

1. **Program Objectives**
   - Briefly describe the community and the United Way Strategy for Change your program is designed to address. Include pertinent statistical and demographic information.
2. **Program Activities and Timelines**
   - Indicate the primary or major types of activities that will occur to carry out the project and their anticipated start and end dates.
3. **Program Outcomes**
   - Describe the expected outcomes, benefits, or results that participants will gain from their involvement in the project.
4. **Program Evaluation**
   - How will you measure and evaluate the overall success of your program? How will you evaluate the results experienced by participants?

TARGET AUDIENCE – See Appendix II for the full list of required age range and demographics

1. **Participants**
   - Describe who will participate in and/or benefit from the program. Include descriptions of the clients and the conditions or behavior they experience. Also include the scope of the problem(s) this program seeks to address and provide supporting local data.
2. **Age Range**
   - Select the age of the audiences who will benefit from the program that you are able to track and report – must be able to track at least one.
3. **Demographics**
   - Identify the demographics of the participants that you are able to track and report – must be able to track at least two.

MEASUREMENT

1. **Please choose which outputs you will track**
   - Output options
2. **Proposed outcomes**
   - Outcome options

BUDGET – See Appendix III for tips on writing a grant budget

1. **Budget Narrative**
   - The budget narrative is your opportunity to clarify the program budget for reviewers. At a minimum, you must provide the following:
   - Explanation of any line item in the budget identified by an asterisk
   - Explanation if your program has expense on the line item "Direct financial assistance to clients"
   - Explanation of any variance from the draft budget greater than 10%
   - If United Way is not able to fund the full amount of the request, how will this affect the program?
2. **Budget Worksheet**

COUNTER-TERRORISM FORM

- In compliance with the spirit and intent of the USA PATRIOT Act and other Counter Terrorism Laws, UWRC requires that each funded agency certify that it is in compliance with the UWRC the United Way Worldwide's compliance program.

DIGITAL SIGNATURE from CEO or Director

RUBRIC FOR IMPACT GRANTS

1. **Overall, does this program clearly address its chosen Strategy for Change?**

   Strong – The application clearly connects their program to the **Strategy for Change** that they are addressing. It is obvious that the applicant has become familiar with the Community Needs Assessment and has used that data and other data to support the need for their program in their community. The program has collaborative partners who are involved in the overall success and delivery of the program, or they have a clear explanation of why there are no collaborative partners.

   Average - The application connects their program to the **Strategy for Change** that they are addressing, but the connections could be stronger. There is statistical data to support the need for the program, but the need either isn't clearly defined or connected to the Community Needs Assessment. They have some collaborative partners, or they have explained why no partners exist.

   Weak - The application does not clearly connect their program to the **Strategy for Change** that they are addressing. The statistical data is either missing, does not support the need for the program, or the program does not adequately meet the need they identify. There are no collaborative partners and does not adequately explain why.

2. **Do the Program Results and Evaluation clearly show that the program will be able to produce outcomes that address the Strategy for Change the program is designed to address?**

   Strong – The **Program Results and Evaluation** sections clearly explain the expected outcomes and there is ample capacity to be able to track the required outcomes. Additionally, the chosen outputs and outcomes are relevant and consistent with the **Program Activities and Program Details**. It is obvious that this program will have a measurable impact that aligns with United Way's community goals and strategies.

   Average – The **Program Results and Evaluation** sections explain the expected outcomes and there is the capacity to be able to track the required outcomes. The chosen outputs and outcomes align with the **Program Activities and Program Details**. This program will have a measurable impact.

   Weak – The **Program Results and Evaluation** sections are either unclear or lacking details that could explain the expected outcomes. The capacity to be able to track the required outcomes is either not clear or is not fully addressed. Additionally, the outputs and outcomes they have chosen are not relevant and/or consistent with the **Program Activities and Program Details**. It is not obvious that this program will have a measurable impact.

3. **Is the Target Audience clearly described, reflecting the demographics of the community in which they work, and address an audience mentioned in the Community Needs Assessment (if applicable)?**
   Note: *If the clients are not in the United Way service area, the program is not eligible.*

   Strong – The **Target Audience** is very clear. They are in the United Way service area, there is good supporting data, and the program is able to show that they will be able to collect demographic data. The

Participants section gives a good sense of who this program will serve, why they are being served, and the challenges they are experiencing

Average – The **Target Audience** is stated. They are in the United Way service area, there is supporting data, and the program should be able to collect demographic data. The **Participants** section explains who this program will serve and why they are being served.

Weak – The **Target Audience** is mentioned. They are in the United Way service area, there is either no supporting data or the data is insufficient. It is unclear if the program will be able to collect demographic data. The **Participants** section does not clearly explain who this program will serve or why they are being served.

4. **Does the Program Budget and Budget Narrative make sense? Is it accurate and logical? Does United Way's contribution have a tangible and clear impact on service delivery?**

Strong – The budget is well thought out and accurate. All sources of income are listed, and all expenses seem reasonable. United Way funds play an important role in the delivery of the program so that we can ensure our funding has an impact. The **Budget Narrative** clearly explains how the program would be affected if the full funding amount is not awarded and changes to potential outcomes and service delivery are addressed. If this is a new program, United Way funds are the catalyst for the program. If this is an expansion of services, United Way funds are critical to that expansion.

Average – The budget is accurate. All sources of income are listed, and all expenses seem reasonable. United Way funds play a role in the impact the program will have. The **Budget Narrative** explains how the program would be affected if the full funding amount is not awarded and changes to potential outcomes are addressed. It is clear how funds will be used.

Weak – The budget has errors and/or missing information. Sources of income are not clearly listed and/or expenses do not seem reasonable. It is not obvious how United Way funds play a role in the impact the program will have. The **Budget Narrative** does not fully explain how the program would be affected if the full funding amount is not awarded. It may or may not be clear how funds will be used.

Appendix

APPENDIX I – Letter of Intent Review Guidelines

UWRC GRANT REVIEW CONSIDERATIONS – Letters of Intent

Letters of Intent (LOI) – For Impact Grants, these are brief program descriptions that outline how the program aims to use a Strategy for Change to work toward a community goal. Safety-net Grant LOIs state how a program will provide one of the approved services.

What to consider:

- Does it address a Strategy for Change and seem able to produce the required measures? (IMPACT GRANTS)
- Does it address findings in the Community Needs Assessment?
- Does the budget seem reasonable? Looking at the number of people it is proposed to serve (outputs) and the services provided?
- Is it fundable? - serving people in our service area – clearly addresses one of our focus areas – allowable program activity
- Safety-net grants should provide a service to meet a basic need for people in our service area – Is it meeting an unmet need or expanding access or continuing a tradition of meeting needs?

Once you have read the LOIs, you will state whether or not a program should move to the application phase and leave feedback for the program. The feedback is VERY important *(and required*) and will be given to the applicant.

Feedback on LOIs should:

- Let the writer know what they have done well and praise good work
- Tell the writer what more information you want to see in the application that will help you become more informed
- Ask questions that the application should answer but didn't
- Let the writer know very clearly why you don't think that the program should apply – give clear examples and offer ideas for improvement

The full Community Impact Council will review all of the feedback and suggestions before they make their final decisions.

APPENDIX II – Categories for Target Audience Tracking

Required Target Audience Tracking

Age Range Options

- Children 0 – 5 years
- Children 6 – 11 years
- Teens 12 – 16 years
- Youth 17 – 25 years
- Adults
- Older adults (55+ years)

Demographic Options

- **Age groups**
  - Adults
    - Older adults
    - Seniors
    - Young adults
  - Children and youth
    - Adolescents
    - Children
    - Infants and toddlers
    - Preteens
- **Ethnic and racial groups**
  - White
  - Black or African American
  - American Indian or Alaska Native
  - Asian
  - Native Hawaiian or Pacific Islander
  - Hispanic origin
- **Family relationships**
  - Caregivers
  - Parents/Grandparents
  - Widows and widowers
- **Gender and sexual identity**
  - Men
  - Women
  - LGBTQ people
- **Health**
  - People with disabilities
  - People with chronic health conditions
  - Pregnant people
  - People with substance use disorder
- **Social and economic status**
  - At-risk youth
    - Dropouts
    - Foster youth
    - Out-of-home youth
  - **Economically disadvantaged people**
    - Extremely poor people
    - People experiencing homelessness
    - Low-income people
    - Working poor
- **Other**

APPENDIX III – Memorandum of Understanding

United Way of the River Cities, Inc.
Memorandum of Agreement
with
XXXXXXX

This agreement has been made and is entered into between United Way of the River Cities, Inc. and <<Name>>.

United Way of the River Cities, hereinafter referred to as UWRC, and <<Name>> agree to work together cooperatively to improve lives in one or more of the following counties - Cabell, Wayne, Lincoln and Mason in West Virginia and Lawrence and Gallia Counties, Ohio, by creating long-term solutions to significant community problems.

United Way of the River Cities' mission is to lead our community in responding to human needs. To achieve this mission, UWRC will work collaboratively with local organizations to support strategies to address key issues in the areas of Education, Income, Health, and Safety Net services.

I. Term of Agreement
This agreement shall be effective January 1, XXXX through December 31, XXXX unless terminated in accordance with terms to be defined in this agreement.

The recipient <<Name>> may terminate this Agreement at any time by giving a 30-day written notice to UWRC's Board of Directors. UWRC reserves the right to discuss an <<Name>>'s decision to terminate this agreement with the <<Name>>'s Executive Committee/Board of Directors. UWRC may terminate this agreement in the best interest of the community provided the notice in writing of such termination shall have been given to the recipient <<Name>> at least 30 days prior to the effective date of the termination. Such action shall be taken by a majority vote of UWRC's Board of Directors.

II. Filings
<<Name>> must be a non-profit organization and provide the appropriate IRS determination letter to UWRC to keep on file.

<<Name>> must be registered as a charitable organization with either the West Virginia Secretary of State's office or the Ohio Attorney General's office and provide proof of said registration to UWRC. Organizations which are otherwise exempt from registering must provide UWRC a written explanation.

III. Mutual Understanding
Both UWRC and <<Name>> agree:

- To communicate with each other on a regular basis the goals, objectives, progress and problems of the organization as they impact its ability to provide services to the community.
- To work together on matters of mutual interest in service to one or more of the following counties: Cabell, Wayne, Lincoln, Mason counties, West Virginia and Lawrence and Gallia Counties, Ohio.
- To provide services according to its mission and within its mission and ensure there is no discrimination or harassment on the basis of race, color, religion, sex, sexual orientation, gender identity or expression, age, disability, marital status, citizenship, national origin, genetic information, or any other characteristic protected by law.
- To maintain an equal opportunity policy.
- Influencing factors, beyond the control and management of <<Name>> could affect the measured program outcomes outlined in Exhibit A.

IV. Nature and Scope of Services
<<Name>> must provide services or functions within one or more of United Way's four Focus Areas – Youth Opportunity, Financial Security, Healthy Community, and Community Resilience services.

The particular nature and outcomes herein contracted for, are outlined in Exhibit A.

The services for which outcomes are listed, pursuant to this Agreement, shall be performed in a manner acceptable to UWRC, consistent with the highest standards of care, and in strict compliance with all applicable federal, state, and local laws, regulations, and procedures which are in existence at the commencement of this Agreement, and which may be adopted or amended during the term of this Agreement.

During this funding period, the outcomes outlined in Exhibit A may be modified and altered, however UWRC must be notified in writing of all such modifications and alterations and approve all changes. If there are proposed adjustments to program activities and procedures, there shall be joint consideration of how such change might affect the program's purpose and outcomes.

V. Funding
Funding for the nature and scope of the outcomes outlined in Exhibit A will be <<AMT>> to be expended and restricted to the programs and for the amounts as outlined in the application. No change in the distribution of funding by <<Name>> is permitted without prior approval. This funding cannot be used for other project outcomes without prior approval.

The allotted funds will be distributed on a reimbursement basis for Safety Net grants pending receipt of the financial expenditures form and all relevant receipts, journal entries or other proof of expense. Reimbursements requests can be made monthly and must be received by the 9th of each month to ensure timely deposits.

The allotted funds will be distributed on an allocation basis for Impact Grants pending all required reporting that is due during the granting cycle both current and previous. Reports will be completed every 6 months and on the 15th of the month. Allocation payments will be distributed every quarter on the 30th of the first month during the quarter.

No funds from UWRC can be used for re-payment of debts, interest or replacement of capital endowment, or other funds that have been used for operation expenses not directly related to the funded project and reflected in the approved budget.

VI. Outcome-Based Agreement
It is mutually agreed that this Agreement is impact based and continuation of funding is contingent upon adequate adherence to standards detailed in this Agreement. The funded <<Name>> must agree, subject to confidentiality standards, to provide access to pertinent records, reports and documents both financial and programmatic, upon reasonable notice for the purpose of determining compliance with outcomes-based standards.

VII. Reporting Requirements
<<Name>> agrees to prepare and submit all financial and programmatic reports resulting from the delivery of services outlined in this Agreement in accordance with the schedule provided them. All reporting requirements are expected to be submitted in a timely fashion without additional reminders. In cases of non-compliance, the monthly reimbursements will be held until the <<Name>> is once again in compliance.

<<Name>> agrees to furnish UWRC with an annual audit or financial review, in accordance with UWRC guidelines. Such reports provide full disclosure of all support/revenue and expenditures. The annual audit or review must be submitted to UWRC no later than 11 months after the close of the <<Name>>'s fiscal year. If the required report is not received on time, funds will be held until such time the report is provided to UWRC.

UWRC may periodically arrange site visits in addition to requiring progress reports. Site visits will be conducted by trained community volunteers. The site visit may include a review of the recordkeeping for the program and a discussion of the progress of the program.

VIII. Financial Reporting Requirements

- If an <<Name>>'s total revenue is $500,000 or more, the <<Name>> shall submit its Form 990 and an independent financial audit conducted by a Certified Public Accountant which is in conformity with generally accepted accounting principles.
- If an <<Name>>'s total revenue is between $200,000 and $499,999, the <<Name>> shall submit a copy of its Form 990 and an independent financial audit or an independent financial review conducted by a Certified Public Accountant.
- If an <<Name>>'s total revenue is less than $200,000, the XXXXXXX shall submit its most recent Fiscal Year End statement of Financial Position and Statement of Activity comparative to the previous year, duly approved by its Board of Directors.

Alternate reporting for Faith-based Organizations

- Current Form 990 (or a statement of exemption on letterhead)
- Charitable registration letter for state of OH or WV (or a statement of exemption on letterhead)
- Organizational chart
- List of internal controls

<<Name>> agrees to:

- Comply with all UWRC policies and procedures
- Respond to requests for information from UWRC within 30 days

IX. Collaboration

When practical and/or applicable, <<Name>> agrees to seek collaborative opportunities with other agencies, both public and private, in an effort to address community issues in the most effective and efficient manner.

UWRC agrees to participate in community initiatives and collaborations that enhance our collective ability to impact changing and emerging community issues.

X. Protection of Public Funds

<<Name>> agrees to protect public funds by maintaining sound financial operations on a definite budget basis and maintaining a sound system of accounts covering income, expenditures, capital funds, and all other financial transactions according to national uniform accounting standards. No liability for unauthorized deficits shall accrue to UWRC.

XI. Licensure

<<Name>> agrees to maintain all federal, state, and local licensures as required by law and all applicable certifications current and to make such certifications available to UWRC upon request.

XII. Laws

<<Name>> and UWRC agree to abide by all Federal and State laws pertinent to the recipient <<Name>> and UWRC.

XIII. UWRC Identification

<<Name>> agrees to identify that <<Name>>'s funding relationship with UWRC using UWRC's logo for all UWRC funded programs and identify the program(s) as UWRC funded in all media communications and printed materials. <<Name>> is encouraged to use the UWRC logo on letterhead and, where appropriate, in the <<Name>> facility.

XIV. Campaign

<<Name>> staff and Board of Directors agree to support UWRC fundraising efforts by conducting an employee campaign and providing staff presentations at employee campaign meetings. <<Name>> acknowledges UWRC's position as their representative in any and all workplace campaigns in Cabell, Wayne, Lincoln, and Mason counties in West Virginia and Lawrence and Gallia Counties, Ohio.

UWRC agrees to conduct workplace campaigns to improve lives in its service area while taking into consideration the financial needs of local programs, the economic climate of the community and the best interest of its donors. In addition, UWRC will supplement the workplace campaigns by conducting special events at different times during the year.

<<Name>> will conduct a workplace campaign during the year to benefit United Way of the River Cities fund raising campaign. The <<Name>> will entertain either a United Way staff member or Ambassador to speak with employees and/or volunteers as part of the workplace campaign.

XV. Compliance

Failure to comply with the provisions of this agreement may result in termination or suspension of funding. Suspension of funding will occur by a vote of the Board of Directors and suspension will commence immediately. Termination of funding shall occur through a vote of the UWRC Board of Directors, and a 30-day written notice will be given detailing reasons for the termination. An <<Name>> may appeal its termination to the UWRC Executive Committee. The Executive Committee will submit their recommendation to the UWRC Board of Directors for a final decision.

XVI. Agreement of Indemnity

During the course of this agreement, the <<Name>> agrees to and hereby does release and forever discharge UWRC from any and all obligations and liabilities whatsoever under or on account of said purposes specified in the programs(s) funded by UWRC. Further stated that UWRC will be held harmless for any acts or omissions that may be determined to be negligence or any breach of law by the <<Name>>.

<<Name>> expressly represents and warrants to UWRC that it is solely responsible for its actions and inactions in performing this Agreement and for filing all necessary forms and returns and for making all required payments with the relevant taxing authorities.

XVII. Governance

<<Name>> and UWRC agree to maintain an active, rotating, and representative governing board, with one member to serve as Treasurer and with the membership to serve without pay. The Board will meet on a regular basis (at least quarterly) to oversee and manage the goals and objectives of the <<Name>> through appropriate policies and procedures. UWRC agrees to recognize the recipient <<Name>>'s autonomy in determining its own policies in administration of its program within the scope and spirit of this Agreement.

XVIII. Agreement

This Agreement is the final, complete and exclusive agreement of the parties with respect to the subject matter hereof and supersedes and merges all prior discussion between UWRC and <<Name>>. No modification of or amendment to this Agreement, nor any waiver of any rights under this Agreement, will be effective unless in writing and signed by the party to be charged. The majority of the officers and board members of <<Name>>, having read the Agreement, subscribe to its provisions.

APPENDIX IV – Grant Reimbursement Rules

UWRC GRANT PAYOUT PROCEDURE

To ensure that grant funds are being used to support programs that can operate effectively, the Community Impact Ad Hoc Committee directs the Director of Community Impact to:

- Require all Safety Net grants to be reimbursement-based
- Require all Impact Grants to be quarterly allocations.
- Require all Impact Grant recipients to turn in reports every 6 months in order to receive their next quarterly allocation.
- Requests for reimbursement will be made via: unitedwayrivercities.org/reimbursement-form
- Require and collect proof of expenditure. Funds must match approved grant categories and be used to fund the program's operation.
    - Proof will include but not limited to – receipts, bank, or credit card statements, pay stubs, general journal entries, purchase orders, cancelled checks.
- Examine the provided documentation and request additional details as needed.
- Reject any unauthorized expenses.
- Approve the expenses and pass the approval onto the Finance Director who will initiate the reimbursement by the 15th of each month.
- Require at least 25% of the funds awarded to be requested for reimbursement 6 months into the grant year for Safety Net grants. If the funds remain unspent 6 months into the grant cycle, a written explanation to UWRC will be required or the grant will be reevaluated.

Adopted 5/2023 – Subject to revision

APPENDIX V – Financial Due Diligence

Financial Document Review Process

1. **The following required financial review documentation will be provided during the letter of intent phase so that it will be on hand when eligible agencies are invited to apply.**
    - Current IRS Form 990/990 EZ
    - The appropriate financial reporting as described below:
        - *If an agency's total revenue is $500,000 or more the agency shall submit an independent financial audit conducted by a Certified Public Accountant and in conformity with generally accepted accounting principles.*
        - *If an agency's total revenue is between $200,000 and $499,999, the agency shall submit an independent financial audit or independent financial review conducted by a Certified Public Accountant.*
        - *If an agency's total revenue is less than $200,000, the agency shall submit its most recent Fiscal Year End statement of Financial Position and Statement of Activity comparative to the previous year, duly approved by its Board of Directors.*
        - **Faith-based Organizations** are exempt from the above – *see requirements below.*
        - Charitable Registration Letter for state of WV or Ohio
    - **For Faith Based Organizations Only:**
        - Current Form 990 (or a statement of exemption on letterhead)
        - Charitable registration letter for state of OH or WV (or a statement of exemption on letterhead)
        - Organizational chart
        - List of internal controls

    a. The Director of Community Impact will ensure that the accurate documents are submitted.
    b. The Directors of Community Impact and Finance will review the documentation and make note of any items that require further investigation.
    c. Members of UWRC Board Finance Committee members may be asked to volunteer with the reviews, if needed.
    d. If the UWRC staff and or volunteers determine that the financial review reveals cause for concern, they will relate the findings to the Community Impact Council.
    e. The Community Impact Council may use the findings as cause not to fund the application.
3. **All safety net grants will be paid out on a reimbursement basis. *(see Appendix V)***
    a. The Director of Community Impact will review the monthly requests. Approved requests will be sent to the Director of Finance.
    b. The Director of Community Impact may question expenses that do not seem to align with the budget or program outline and has the right to request additional information or deny the request.
4. **All Impact Grants will be paid out in quarterly allocations. (See Appendix V)**
    a. The first allocation will be given at the start of the grant cycle.
    b. The rest of the allocations will be given quarterly and after a 6-month report has been turned in to document the progress of the program and to look at the measurables that were set out in the grant application.
    c. A detailed Final grant report will be requested at the end of the second year of the grant cycle.

Appendix VI- Reporting

United Way of the River Cities requires reporting at the 6 month point and the end of the grant cycle to check in on the progress toward objectives and outcomes of the funded program for all Safety Net grants.

United Way of the River Cities requires reporting every 6 Months and a Final Report at the end of the grant to check in on the progress towards objectives and outcomes of the funded program for all Impact Grants.

We trust that agency partners will strive to achieve the goals set forth in their original application and encourage agencies to have a plan if programs are not going as designed. If a major shift in focus, goals or programming is anticipated for the funded program at any time during the funding cycle, the agency must contact UWRC to discuss as soon as they are aware before implementing any changes.

Safety Net Mid-Year Report (subject to change)

- Program Name
- Agency Name
- EIN Number
- Contact Name
- Contact Email
- Contact Phone
- Amount of funding received
- Date funding received
- Funds spent to date
- Demographics (consider service to-date)
- How have funds been used?
- Are you spending funds as expected? Please explain.
- Please provide a testimonial or narrative story about a program participant or beneficiary of this funding.
- Please provide photos from the program or program participants.

Safety Net Year End Report (subject to change)

- Date
- Name
- Email
- Contact name
- Contact Email
- Organization Name
- Total Program Participants
- County served
    - Number of participants served from each county
- Population served
- Ethnicities served
- How does your agency engage in the communities you serve? Do you have community partners? Do you offer community training?

- What specific problems or needs in the community is this program addressing?
- Frequency- how often do program activities occur?
- Do you collaborate with other organizations or groups?
    - Please describe the collaboration that has taken place and if that other group(s) has/have provided funding?
- How can UWRC collaborate more with your agency on projects to benefit our community?
- What is your Impact?
    - Please provide AT LEAST TWO impact stories that pertain to UWRC funded programs. These narratives help us communicate the positive effects agencies supported by UWRC have on our community and how far givers' donations go. These stories should be about specific individuals you have served and the impact on their lives. Names will be changed if the story is used for publication, social media, or reporting.
- Tell us more….
    - Please provide AT LEAST ONE success story that pertains to UWRC funded programs. Stories help us share with others the work we do together in the community.
- Please share any images, files or data that is relevant to your UWRC funding.

Impact Grant Quarterly Report (subject to change)

- Program Name
- Agency Name
- EIN Number
- Contact Name
- Contact Email
- Contact Phone
- Amount of funding received
- Date funding received
- Total Program Participants to date
- County/Counties served
- Population served
- Ethnicities served
- Please briefly explain the current program status
- Please share a success story.

Impact Grant 12 Month Report (subject to change)

- Date
- Name
- Email
- Contact name
- Contact Email
- Organization Name
- Total Program Participants
- County served
    - Number of participants served from each county
- Population served
- Ethnicities served

- How does your agency engage in the communities you serve? Do you have community partners? Do you offer community training?
- What specific problems or needs in the community is this program addressing?
- Frequency- how often do program activities occur?
- Update on the measurements selected in your grant application. What was initially anticipated with the number of people served for your selected measurable. What was the actual number/percentage of people served for the selected measurable.
- Do you collaborate with other organizations or groups?
    - Please describe the collaboration that has taken place and if that other group(s) has/have provided funding?
- How can UWRC collaborate more with your agency on projects to benefit our community?
- What is your Impact?
    - Please provide AT LEAST TWO impact stories that pertain to UWRC funded programs. These narratives help us communicate the positive effects agencies supported by UWRC have on our community and how far givers' donations go. These stories should be about specific individuals you have served and the impact on their lives. Names will be changed if the story is used for publication, social media, or reporting.
- Tell us more….
    - Please provide AT LEAST ONE success story that pertains to UWRC funded programs. Stories help us share with others the work we do together in the community.
- Please share any images, files or data that is relevant to your UWRC funding.