

# FUND YOUR GOOD WORK

APPLY FOR A THREE-YEAR UNITED WAY COMMUNITY GRANT



## United Way of Greater Toledo Application for July 2024 to June 2027 Funding

Thank you for your interest in applying to be a granted partner of United Way of Greater Toledo (UWGT). This document will help guide you through the application process. You can find additional information and submit your application online at [unitedwaytoledo.org/grant](https://unitedwaytoledo.org/grant).

### Community Impact

For more than 100 years, United Way has fundraised for and invested in the Greater Toledo community. With more than 20,000 donors, 10,000 local volunteers, and nearly \$7 million dollars raised annually, we continue to bring incredible people together to make positive community change. We fund health and human service programs that impact the areas of education, financial stability, health, and housing. We use data to understand the biggest needs that exist in our community and the effectiveness of our granted programs to impact that need. Because we use data to guide our investment decision-making process, we require our granted partners to report on the outcomes of their programs annually. These reports, in addition to other community level data, inform the way we fund.

### Funding Requirements

United Way is seeking program applications for a **three-year grant funding cycle** beginning **July 2024 through June 2027**. The following entities may apply for funding:

- A single program led by ONE organization
- A single program led by multiple organizations (a collaboration)
- Multiple programs led by ONE organization (your organization submits funding applications for multiple programs)
- Multiple programs led by multiple organizations (a collaboration submits funding applications for multiple programs)



[unitedwaytoledo.org](https://unitedwaytoledo.org)



- A single program cannot submit a stand alone application and submit as part of a collaborative application

UWGT does not invest in overall agency operations; we fund costs associated with operating programs (staff, supplies, etc.). However, the program funding you receive is unrestricted (UWGT dollars can cover any costs associated with programming you see fit). **This fund is for pre-existing programs that have been in operation for over 12 months.**

Partners receiving an investment from UWGT must meet certain requirements, and sign a [Funding Agreement \(sample\)](#) when awarded. Partners receiving UWGT investments are required to submit program and financial reports twice a year through an online database. Partners will receive an investment for **three consecutive years** dependent upon:

- The nature of the program/collaboration
- The amount of funds available in the UWGT Community Fund
- UWGT review of individual program/collaboration reporting

Programs must meet the following requirements to be considered:

- Must provide health and human services in Lucas, Ottawa, or Wood County in the State of Ohio
- Must be eligible to receive tax-deductible donations within the meaning of IRS Code Section 170 (c) (1) or (2), which includes 501(c)(3) organizations
- Must submit an audit or a review of financial statements and IRS Form 990 or 990-EZ (only the lead agency is required to submit these documents in a collaboration)
  - If awarded funding, please note the following audit submission requirements based on your annual revenue:
    - Agencies with annual budgets of \$500,000 or more submits a full, independent audit and management letter conducted by an independent CPA whose examination complies with GAAP. The board, executive committee or audit committee reviews the auditor's management letter and takes appropriate action to minimize any risks identified. The audit and letter are submitted no later than nine (9) months after the end of an agency's fiscal year.
    - Agencies with annual budgets of at least \$100,000 but less than \$500,000 are required to submit a review of their financial statements from an outside, independent CPA firm no later than nine (9) months after the end of an agency's fiscal year.
    - Agencies with budgets of less than \$100,000 must submit un-reviewed internal financial statements no later than three (3) months after the end of an agency's fiscal year.

## Checklist of Required Documents for Application



unitedwaytoledo.org



In order for a program/collaboration's application to be eligible for review, all of the following documents must be uploaded into the grant application system. You will find a specific section dedicated to supporting documents when you are logged in. All supporting documents must be uploaded and the narrative portion of your application must be submitted by **Friday, February 23 at midnight**. Applications that are not complete, do not have all the required documents, and / or do not meet the deadline will not be considered for funding. You will need to submit:

- Completed Application**
- Organizational & Program Budget**
- Audit/Review/Financial Statement**
- IRS Form 990 or 990-EZ**
- Memorandum of Understanding(s) for Partners - (collaborative application only)**
- Board Roster**
- Individual Demographic Data Sample**

---

### **Collaborations**

In addition to individual program application, UWGT supports application submission by collaborations composed of multiple programs from different agencies. Financial support will be provided to the organization identified as the "lead agency" of the collaboration. All collaborating agencies must adhere to UWGT's Funding Agreement. Collaborations are required to include a Memorandum of Understanding (MOU) between participating agencies. If awarded a UWGT investment, the lead agency is responsible for ensuring all partners of the collaboration have the systems and processes in place to achieve the intended outcomes; adhere to UWGT's policies; and spend funds appropriately.

### **What We Fund**

United Way of Greater Toledo funds programs that positively impact individuals across Lucas, Ottawa, & Wood counties. You can learn more about our funding methodology and our impact work in the community in our [Live United Plan](#).

In **Lucas and Wood Counties**, we are considering program applications in the areas of:

- Education
- Financial Stability
- Health
- Housing

In **Ottawa County**, we are considering program applications in the areas of:

- Financial Stability
- Health



[unitedwaytoledo.org](http://unitedwaytoledo.org)



To better understand our priority funding areas, refer to the **pages 6-12** of the [Live United Plan](#). The content of these pages will be reflected in the application where you will select one of the following:

- The pillar you are applying under (education, financial stability, health, or housing). In the application, you will see the population level results we hope to see for our community. For example, if you operate a program that focuses on increasing the long-term financial stability for individuals who are in need, you will select:
  - Financial Stability - All households in Lucas / Wood County are financially stable.
  
- Next, you will see a drop down list of strategies with a description. Select which strategy you are implementing within your program to impact the result above. For example, if your program provides trainings and certification to people for increased job opportunities, you would select:
  - **Integrated Financial Services:** Provide integrated financial coaching, employment coaching/access to contextualized, short-term credentialing programs in in-demand occupations, and income supports counseling services.
  
- Finally, after you select your strategy, you will see corresponding measures. Check all the measures you currently have the capacity to capture. If you **do not OR cannot** capture a particular measure, do not check the box.
  - FS1 - # and % with increase in net income
  - FS2 - # and % retaining employment for 3, 6, 9 and 12 months
  - FS3 - # and % with increase in net worth
  - FS4 - # and % with credit score increase
  - FS5 - # and % placed in jobs or who advance in existing employment
  - FS6 - # and % receiving integrated financial and employment coaching services
  - FS7 - # and \$ of prepared taxes and refunds (federal and state)

In this example, perhaps you would select FS2, FS5, and FS6. The measures you select will become part of your reporting requirements if your program is funded.

### **One-on-One Support & Technical Assistance**

If you have technical assistance questions related to using the application portal, please contact the help desk at United Way of Central Ohio: [Reporting.Help@uwcentralohio.org](mailto:Reporting.Help@uwcentralohio.org). They are hosting the grant software we are using this year and can help with any technical issues you are experiencing.



[unitedwaytoledo.org](http://unitedwaytoledo.org)



If you need additional help, UWGT staff will also be available to for one-on-one questions related to your application during designated office hours. Please call Jill Bunge at 419.254.4648 during the times below to discuss any questions you have about the grant or your application. Applicants are served on a first come, first served basis. If a staffer is speaking with another applicant, please leave a message and your call will be returned in the order in which it was received.

- Wednesdays beginning January 10, 2024 – February 21, 2024 from 1:00pm-3:00pm
- Fridays beginning January 12, 2024 – February 23, 2024 from 10:30am-12:00pm

If these times do not work for your agency, please contact us to schedule a different time: Jill Bunge (email) [jill.bunge@unitedwaytoledo.org](mailto:jill.bunge@unitedwaytoledo.org) or (phone) 419.254.4648.

## Interviews

UWGT recognizes the value and importance in providing the space and opportunity for programs / collaborations to share their story and positive impact to support investment decisions. Applicants selected by our volunteer reviewers will be invited for an interview. UWGT will request that agency lead staff and program staff attend the interview. Each invited program / collaboration will have a one hour interview with the last 15 minutes dedicated to questions and dialogue. All interviewees will be provided with the interview questions beforehand.

Strong interviews will:

- Show consistency with and expand on the application
- Provide insight into the why you do what you do and your motivation for serving the community
- Speak directly to how a UWGT investment would enhance / support services

## Review Process

UWGT is a volunteer-driven organization and our funding decisions reflect this value. We bring together volunteer stakeholders from across the community and at all levels of the organization to advise, recommend, and approve the funding needed to pursue key strategies. Our Community Impact Cabinet (CIC) is a standing body of volunteers, they review program reporting, listen to experts on community needs, identify gaps and opportunities, match them to key results, and make funding recommendations to the UWGT board of directors. CIC members will review applications for our 2024-2027 grant cycle. In addition to our CIC, we recruit additional members of the community to help with this process to ensure we have demographic representation, expertise, and first hand knowledge of the best strategies, programs, and community needs we intend to serve.

## Grant Review Timeline\*



[unitedwaytoledo.org](http://unitedwaytoledo.org)



January 8, 2024 – Lucas / Wood & Ottawa County Grant Applications Open  
February 23, 2024 – Lucas / Wood & Ottawa County Grant Applications Close  
March 11, 2024 – March 29, 2024 – Program Applications are reviewed  
March 29, 2024 – Interview questions are publicly posted for review and preparation  
April 6, 2024 – All applicants moving to interview are notified by this date  
April 8, 2024 – April 19, 2024 – Applicant interviews are conducted  
April 22, 2024 – May 8, 2024 – Internal preparation of applicant information for determinations  
May 9, 2024 – Community Impact Cabinet Meeting for Investment Recommendations  
May 15, 2024 – UWGT Board of Directors Meeting to Approve Investment Recommendations  
May 17, 2024 – Funded Applicants Notified, Non-Funded Applicants Notified  
June 7, 2024 – Funding Agreements (2024-2025 FY) Sent to Selected Grantees  
July 1, 2024 – 2024-2027 Grant Cycle Begins, First Payment Distributed to Granted Partners

*\*All Dates are subject to change. Applicants will be notified of any adjustments via email*

## Requirements of United Way Granted Partners

If your program is selected to be funded, you will be expected to\*:

- Actively participate in one of our Collective Impact Collaboratives in education, financial stability, health, or housing. One agency staffer with program decision-making capacity must be designated to attend Collaborative meetings. Participation in the work of the collaborative is estimated to be ~20 hours annually.
- Include your program in the United Way 211 Database.
- Use a system for measuring the outcomes for individuals served by your program, including qualitative and quantitative data to support program results.
- Complete a Logic Model\*\* at the beginning of each program year of the three-year grant cycle with assistance from UW staff.
- Complete mid-year reporting on program progress halfway through each program year of the three-year grant cycle.
- Complete year-end reporting on program outcomes at the end of each program year of the three-year grant cycle.\*\*\*

[\\*Review our current funding agreement](#) (subject to amendments for upcoming grant year)

[\\*\\*Review a sample logic model](#)

[\\*\\*\\*Review our current reporting requirements](#)

## United Way Support of Granted Partners

As a granted partner of United Way of Greater Toledo, we offer the following additional supports to agencies as requested.



unitedwaytoledo.org



<p>Resource Development</p>	<p>Visibility to corporate partners and donors:</p> <ul style="list-style-type: none"> <li>• Site visits or virtual tours or lunch &amp; learn</li> <li>• Share videos or testimonials of your work</li> </ul> <p>Information sharing:</p> <ul style="list-style-type: none"> <li>• We will share other funding opportunities as appropriate with partners, such as when a donor expresses interest in a particular cause or agency, or if a funding opportunity better aligns with a different organization’s mission or cause</li> </ul>
<p>Volunteering &amp; Marketing</p>	<p>Volunteer recruitment support:</p> <ul style="list-style-type: none"> <li>• Cross promotion of volunteer needs to our email distribution list and on social media</li> </ul> <p>Marketing support:</p> <ul style="list-style-type: none"> <li>• Support around partners securing funding, storytelling, convening, and gathering data to build cases for support</li> <li>• Social media best practices and cross-promotion of events</li> </ul>
<p>Community Impact</p>	<p>Funding opportunities:</p> <ul style="list-style-type: none"> <li>• Connecting partners to funding opportunities across community</li> <li>• Facilitating partnerships / collaboration opportunities across organization</li> </ul> <p>Partner Support</p> <ul style="list-style-type: none"> <li>• Commitment to work with other funders to streamline data collection, reporting, and requests for funding</li> <li>• In-kind support or collection drives for supplies/items</li> <li>• Written letters of support when applicable</li> </ul>
<p>Data &amp; Analytics</p>	<p>Reporting support:</p> <ul style="list-style-type: none"> <li>• Help streamlining reporting, including technology solutions, organization, and alignment across report requirements</li> <li>• Year-round technical &amp; content support for reporting adjustments, changes, and reviews</li> </ul> <p>Customizing program reports:</p> <ul style="list-style-type: none"> <li>• Programs can make requests to view their data in a dashboard or aggregate report format</li> </ul> <p>Data Requests:</p> <ul style="list-style-type: none"> <li>• Programs may request additional reports or historic data beyond their specific program to reflect work within a collaborative (available upon request, according to department capacity).</li> <li>• Information regarding best practice methodologies and industry examples of data collection, analysis, mechanisms.</li> </ul> <p>Program Planning &amp; Measurement:</p> <ul style="list-style-type: none"> <li>• Year-round logic model development and refinement (intended to support programs with continuous improvement efforts making</li> </ul>

	<p>adjustments where implementations do not produce desired outcomes or results).</p> <ul style="list-style-type: none"> <li>• Metric development &amp; refinement (Support for programs in developing metrics to ensure alignment and intended metrics are captured in a semi-standardized manner).</li> </ul> <p>Clear Impact scorecard access for all funded partners:</p> <ul style="list-style-type: none"> <li>• Import, export &amp; API supports on Clear Impact at both an agency level and program level</li> <li>• Discounted Clear-Impact account</li> <li>• RBA Resources &amp; information session access</li> </ul>
--	--

**Contact Information**

For more information about this document or United Way investments, please contact one of our team members:

<p>Jill Bunge Vice President, Impact &amp; Outreach <a href="mailto:jill.bunge@unitedwaytoledo.org">jill.bunge@unitedwaytoledo.org</a></p>	<p>Alishea Wynn Community Impact Manager <a href="mailto:alishea.wynn@unitedwaytoledo.org">alishea.wynn@unitedwaytoledo.org</a></p>
<p>DeVon Overton Vice President, Results &amp; Analytics <a href="mailto:devon.overton@unitedwaytoledo.org">devon.overton@unitedwaytoledo.org</a></p>	<p>Taylor Ross-Parker Community Impact Administrator <a href="mailto:taylor.ross-parker@unitedwaytoledo.org">taylor.ross-parker@unitedwaytoledo.org</a></p>