



**United Way**  
**Bruce Grey**

# MEMBER AGENCY GUIDEBOOK

2023 GRANTING YEAR

DEADLINE: FRIDAY DECEMBER 16TH 2022

FOR MORE INFORMATION CONTACT:

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# REFERENCE INFORMATION

## MISSION STATEMENT

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“To build and strengthen our community by bringing people and resources together to facilitate change.”

## FINANCIAL AND CAPACITY-BUILDING SUPPORT

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Through annual fundraising campaigns, United Way Bruce Grey (UWBG) raises hundreds of thousands of dollars within our community. Those undesignated monies that become available for distribution become part of our Community Fund – which is re-invested locally to address social service issues. There are two streams to this investment:

### COMMUNITY IMPACT SPECIAL PROJECT GRANT

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*One-time funding for community agencies*

These funding streams allow any registered charitable organization in our community, which meet our funding criteria, to apply. Other practical capacity-building support is offered to registered charities that apply for funding.

### SINGLE YEAR FUNDING APPLICATION

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*Ongoing programs or resources*

- Single year funding
- Up to \$30,000/year/per program (\$5000 for new applicants)
- **Distribution of funds is no later than April 30 2021 in entirety**
- These funds support community-wide initiatives & collaborative partnerships
- Intended for well-established Registered Charities with good governance, fiscal policies, and organizational capacity with the ability to measure outcomes.
- Extensive application process

## GRANTING CRITERIA

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### **Recipients must:**

- Be registered charities under the Income Tax Act, or agencies which have an established third-party sponsorship or partnership agreement with a registered charity
- Align with at least one of the three key priority areas
- Demonstrate creative responses to the continuing economic and social changes affecting social services
- Engage and mobilize community
- Meet a clearly defined need
- Address underlying causes of social issues
- Collaborate with, and have the support of, other community groups
- Measure and demonstrate the outcomes of the funded program/project and commit to Open Data sharing
- Exhibit excellence in performance and leadership
- Have well-established governance structures
- Use resources wisely
- Present clear financial reports, and audited financial statements
- Serve and represent the diverse population in our communities

### **Activities not funded:**

- Fundraising campaigns and special events
- To cover deficits
- Structural capital projects
- To retire debts
- To increase endowment funds
- Activities that serve primarily the membership or purposes of religious or political organizations
- To fund tours or travel outside Grey or Bruce Counties
- Conferences and training

## CATCHMENT AREA

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The geographical catchment area for the United Way Bruce Grey covers most of Bruce & Grey County.

## WHAT IS COMMUNITY IMPACT?

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Community Impact is achieved by mobilizing collective action. It is measurable, cumulative and lasting change that improves lives and builds resilient communities.

There are tremendous inter-relationships between the work United Way does, and that which others are doing to address key social problems. For example, to effectively influence a specific condition such as poverty, we need to apply a comprehensive and collaborative approach that includes education, housing, early childhood development, transportation, literacy, health, employment, public policy and many other factors that affect poverty. By examining our communities through a proactive, multi-faceted community-impact lens, we believe our efforts will be more measurable, cumulative and sustainable.

After extensive community research and consultations, we have formed three priority areas. These priority areas are meant to be comprehensive and address the root causes of major social problems across Bruce & Grey County

## PRIORITY AREAS

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All United Way funds are distributed according to our **Three Priority Areas**.

### FROM POVERTY TO POSSIBILITY

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Disparity in income often carries a high price for the entire community. Breaking the cycle of poverty means targeting the source of financial difficulties and fixing these problems at the root. We are looking for initiatives that meet people's basic needs for food, shelter and safety; as well as those that ensure individuals have opportunities to seek stable and sufficient employment, and make education, training and learning opportunities affordable and accessible for all.

#### TARGETS:

- Poverty
- Homelessness
- Neighbourhoods

#### GOAL:

To help people engage in their community by strengthening neighbourhood revitalization efforts, reducing poverty, and improving access to affordable housing

#### OUTCOMES:

- Increased capacity of residents to take action and respond to needs in vulnerable neighbourhoods.
- Improved opportunities for civic engagement and participation in community.
- Increased supports to alleviate the impact of poverty.
- Improved nutrition and food security.
- Improved access to emergency shelter and affordable housing.
- Increased supports and resources to maintain or regain permanent housing.

## HEALTHY PEOPLE, STRONG COMMUNITIES

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When we value and respect the diversity of those around us, our neighbourhoods flourish. Initiatives that are easily accessible create neighbourhood hubs that are safe and welcoming for all, and encourage people to accept each other's differences and work together, are a focus within this priority. We are looking for initiatives that reduce barriers and isolation for those with addictions and mental-health issues through counselling, referrals, rehabilitation and other services. As well, services that support seniors, and individuals with physical, intellectual and emotional disabilities are ideal. We also fund programs supporting our community with shared resources and information. Organizations that centralize services to recruit and educate volunteers are also candidates for funding.

### TARGETS:

- Vulnerable people
- People with barriers, mental health issues
- Seniors in need of support
- Victims of violence & abuse

### GOAL:

To improve opportunities for people to access programs and supports that empower them to overcome barriers, build resilience, reduce isolation and be part of a caring, inclusive community.

### OUTCOMES:

- Increased autonomy and independent living skills.
- Improved access to information and effective supports (including families and caregivers).
- Increased inclusion and participation in community and daily life.
- Increased safety for victims of violence and abuse.
- Improved supports and interventions for people experiencing crisis.
- Improved life skills, basic academic and language skills, financial literacy and employment skills.

## ALL THAT KIDS CAN BE

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Children deserve to live, learn and grow in a stable, caring environment. Our collective goal is to see that children have their basic needs for food, education and shelter met. We are looking for organizations that are supporting the healthy growth and development of young people. This means actively targeting the source of their challenges and working to address systemic issues.

### TARGETS:

- Early Years
- Children & Families
- Youth

### GOAL:

To ensure children and youth are valued and supported members of the community with opportunities and resources to help them reach their fullest potential.

### OUTCOMES:

- Improved knowledge and understanding about the importance of early childhood development.
- Increased cognitive, social and emotional maturity of young children so they can get along with others and are ready to learn.
- Increased supports and opportunities for parents/caregivers to improve their skills and provide a safe and stimulating environment for children.
- Improved healthy behaviours, attitudes, social skills, confidence, communication and decision making skills of children and youth.
- Improved engagement in community, school and learning for children and youth at risk.

## FINAL ASSESSMENTS AND FUNDING DECISIONS

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- The United Way staff will ensure the United Way Allocations Committee receives the assessments and funding recommendations on the applications from the councils and reviews all the data.
- The United Way Allocations Committee will then (after considering the recommendations it has received) make comprehensive final recommendations to the United Way Board of Directors.
- The United Way Board of Directors (after considering the recommendation it has received) will then make a final decision.
- Agencies will be informed of the board's decision in writing, via email
- Agreements are then signed by the applicant and the UWBG.

### **Note:**

Funds will not be made available outside of processing periods except in unusual circumstances and in response to demonstrated emergencies or special needs affecting the community at large.

## MEMBER AGENCY REQUIREMENTS

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All agencies that receive funding must use the United Way logo and/or the words "United Way Member Agency" on all printed and web-based materials. In addition, Member Agencies **MUST** participate in special events held by the United Way. Contact the United Way office for more information regarding Member Agency Requirements.

The United Way values the use of data and open data reporting. Data collection and reporting will be an ongoing expectation of all grant recipients.

## GRANTING DECISION MAKING

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The strength of the United Way Allocations process lies in the hands of the United Way Allocations Committee. This is a process where community volunteers review agency submissions and make funding recommendations to the United Way Board of Directors.

This committee consists of donors, management, union representatives with staff support.



## APPEAL PROCESS

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An agency may appeal an allocation decision if it can clearly show a substantial error or misunderstanding of information in the volunteer review panel's evaluation of the agency's allocation request. An Appeals Committee will be formed to review and recommend action to the UWBG Board of Directors. The Appeals Committee will consist of volunteers appointed by, and accountable to, the UWBG Board of Directors.

### TIMING:

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1. The agency has 15 days from receipt of the Letter of Support to file a written statement of intent to appeal, including a brief summary of the grounds for the appeal, with the UWBG Board of Directors.
2. The agency has 30 days from receipt of the Letter of Support to file a detailed written submission with the UWBG Board of Directors. This detailed written submission must include the grounds for the appeal and the amount requested.
3. The UWBG Board of Directors has 60 days to respond to the agency in writing, after receipt of the detailed written submission.

### PROCEDURE:

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1. The Appeals Committee is formed at the call of the UWBG Board of Directors, after a written statement of intent to appeal is received from an agency. The Appeals Committee is composed of two members of UWBG's Board of Directors, one of whom shall serve as Committee Chair, and three members with experience in the allocations decision-making process, such as former board or allocations committee members.
2. The United Way Allocations Committee will provide the Appeals Committee with all written materials pertinent to the allocation decision being contested.
3. The Appeals Committee will review the detailed written submission from the agency, and the written materials from the United Way Allocations Committee, and determine whether the agency has valid grounds for the appeal.
4. Agencies determined to have valid reasons for appeal will have the right to meet with the Appeals Committee to speak to the written submission.
5. The chair, and members of the United Way Allocations Committee, will have the right to meet with the Appeals Committee.
6. After reviewing all aspects of the appeal, the Appeals Committee will meet at the call of its chair and formulate its report and recommendations to the UWBG Board of Directors.
7. The UWBG Board of Directors will meet to review the report and recommendations from the Appeals Committee. The decision of the UWBG Board of Directors will be final. A copy of the Appeals Committee recommendations, together with the Board's

decision, will be forwarded to the agency appealing within five business days of the decision.

8. If a successful appeal results in a financial adjustment, it shall be paid out of UWBG reserves.