



---

## United Way of Abilene

### Application for 2022 Community Impact Funds

Funding Cycle: January 2022 – December 2022

***Deadline: August 3, 2021 – 3:00 p.m.***

# Community Impact Review Process and Application Guidance

United Way of Abilene's mission is to promote the health, education, and financial stability of every person in the West Central Texas area. We do this by actively seeking to leverage the intellectual, organization, institutional, financial, faith-based, and personal resources of our communities as the best means to make positive, measurable, and lasting change for the families we serve.

United Way of Abilene funding sustains and strengthens a network of local programs and services prepared to address pressing needs in our area in the areas of education, financial stability, and health. We know community challenges are multifaceted, and we endorse the strength of collaboration.

United Way of Abilene's Application for Community Impact Funds in the areas of Education, Financial Stability, and Health is currently open. The application deadline is August 3, 2021. If approved for investment, funding will begin in January 2022 and extend through December 2022. Applications will be reviewed over several months. This process includes Site Visits, Program Presentations, and Stewardship Review. Selected programs will be notified of their 2022 investment in late-December 2021. Please refer and retain the key dates listed in this document. All programs receiving funding in the year 2022 must participate in monthly reporting to United Way through the Community Operating System.

---

## Community Impact Application Process

**Program Application:** The Program Application requests a narrative for the scope, emphasis, and outcomes of the applying agency and program. Your narrative should highlight community needs, relevant approaches to address those needs, and measurable outcomes.

**Stewardship Review Application:** The Stewardship Review Application requests financial statements, agency audits, Form 990s, and other organizational management information.

**Site Visit:** As part of the application and review process, United Way of Abilene will take review volunteers on a site visit of your program (if applicable). A specific date and time will be provided in advance of your site visit.

**Program Presentation:** As part of the application and review process, United Way of Abilene requires applying programs to make a 30-minute presentation to review volunteers. A specific date and time will be provided in advance of the program presentation day.

**Completed program applications are to be submitted in 12 collated, hole-punched, unstapled hard copies. Your submission should begin with the Agency & Program Overview Form – please do not submit copies of cover pages, guidance pages, application rubric, etc.** Applications may be bound with binder clips or rubber bands. Please do not staple. Please type your answers in 11 pt. Arial or similar font and limit your answers to 10 pages collectively. Please provide any survey materials you have that relate to your outcome measures. Additional accepted attachments include agency collateral, program curriculum, and other supporting program documents. Additional documentation does not count towards page limit.

**Please ensure mail delivery or hand delivery of your application by August 3, 2021 at 3:00 p.m. to:**

Hand Delivery: United Way of Abilene  
Attn: Jenn Waldmann  
240 Cypress Street Suite 200  
Abilene, TX 79601

Mail: United Way of Abilene  
Attn: Jenn Waldmann  
PO Box 82  
Abilene, TX 79604

Fax or email submissions will not be considered. You are responsible for submitting complete applications by the deadline. **Any application not received by the deadline will not be eligible for funding.**

---

## Eligibility Requirements

The organization must demonstrate competency in four main areas as well as meet the minimum requirements outlined in this section.

1. Addressing community needs
2. Organization alignment with United Way of Abilene priority areas
3. Good financial standing
4. Sound governance by a Board of Directors

## Organization Requirements

At a minimum, **organizations** must certify or provide the following in order to apply for and receive funding from United Way of Abilene’s Community Investment Review Process:

- Be recognized as an organization exempt from federal income tax under IRS Section 501c (3) of the Internal Revenue Code. *(Exceptions to this requirement may be granted for governmental programs at the discretion of the United Way of Abilene Board of Directors.)*
- Be involved in providing program(s) and services that are health, education, or human-service related and directly serve individuals in Taylor and/or surrounding counties.
- Have an independent governing body consisting of at least nine voting members and who shall meet at least four times per year.
- Maintain a non-discrimination policy or plan.
- Be financially stable and able to submit an annual certified audit as well as an IRS 990 tax form
- Comply with all federal and state laws

## Key Dates

Application for Community Impact Funds Released	June 15, 2021
Application for Community Impact Funds Due	August 3, 2021; 3:00 p.m.
Program Presentations	August 31, 2021
Site Visits	September 7 & 20. 2021
Notification of 2022 Investment Decision	December 2021

## Funding Availability

United Way of Abilene supports programs that show measurable and meaningful program impact. Investment from United Way may be used for a variety of programmatic and/or operational purposes directly related to proposed activities but may not be used for the following: fundraising, capital campaigns, endowment efforts, deficit financing, academic research, support for public office candidates, or grants to individuals. Regardless of the specific use of investment, grantees will be accountable for agreed upon and proposed targets.

## Program Measures

United Way of Abilene is accountable to the community and its donors to fund programs that deliver results and produce the maximum intended benefit in our community. As such, United Way of Abilene requires all applicants to identify clear and concise program measurements. These serve both to project and assess program impact. When forming these measures organizations should consider three questions:

1. What service will your program provide?
2. How many people will benefit from your program?
3. How will you know people have benefitted from your program?

## Application Review & Approval Process

United Way of Abilene is accountable to the community and its donors that programs funded deliver results and produce the maximum intended benefit in our community. To ensure accountability and transparency, United Way of Abilene has established the following application review and decision-making process:

1. All submitted applications will be reviewed by a Community Impact Review Team (CIRT) and Stewardship Review Team of community volunteers with support from United Way of Abilene staff. CIRT and Stewardship Review Teams will review, assess, and score each application.
2. Informed by recommendations from CIRT and Stewardship Review Teams, United Way of Abilene's CIRT Chairs will make a recommendation to the Executive Committee, taking into consideration the context of funding capacity, broader investment goals, and objectives.
3. Final determinations are made by the United Way of Abilene Board of Directors. Notification of decisions will be made in December 2021. United Way of Abilene's community investment process involves extensive community input, transparency, and due diligence. All decisions by the United Way of Abilene Board of Directors are final. United Way of Abilene makes investments and does thorough program reviews on a 3-year cycle. At the discretion of the United Way of Abilene Board of Directors, CIRT, and staff, programs may be invited to enter the 3-year cycle.

The following criteria will be evaluated for all submitted applications:

- Alignment with United Way of Abilene focus and priority areas
- A clear and compelling program design that would enable a layperson to understand the activities and work of funded programs
- A clear plan for addressing community needs through the proposed program, including plans to reach those most in need
- A description of the target population and the strategies used to engage the target population
- Clearly articulated indicators and metrics to enable evaluation of the impact of the program
- Demonstration of resources and collaborations used to reach desired outcomes for the target population
- Documentation of additional financial resources to ensure viability of the program in the short and medium terms
- A financially sound and programmatically appropriate budget

Programs that are awarded 2022 investment will be expected to participate in the following:

- Enter into a Community Partnership Agreement with United Way of Abilene prior to receiving any funding
- Submit program and financial progress reports as specified within the Agreement
- Participate in periodic site visits by United Way staff, donors, or volunteers during the investment period
- Participate in United Way of Abilene activities and capacity-building activities as specified within the Agreement
- Recognize United Way of Abilene as a key partner in promotional materials and communications as specified in the Agreement

## **Continuing Assessment**

As noted above, United Way of Abilene requires programmatic and financial progress reports during your investment period. These reports will be used to ensure that the program is meeting its performance targets, and that are participants are experiencing the intended program benefits. Continuation of funding during the investment period is contingent upon program reporting and performance.

All funded programs must be positioned to gather data to enable timely reporting. Reports will be submitted electronically, as determined by United Way of Abilene. All invested partners are expected to cooperate with assessment activities deemed necessary by United Way of Abilene. Applicants may propose or complete their own evaluation activities, but these may not be in lieu of participation in United Way of Abilene reporting.

## **Additional Information**

If you have questions regarding any aspect of the Community Investment process, please contact: Jenn Waldmann, Community Impact & Marketing Director at or 325-677-1841.

# Application for Community Impact Funds

Signatures certify that all information in this application is true and complete to the best of my knowledge.

Organization Information			
Agency Name:			
Address:			
City, State Zip:			
Phone:		Fax:	
Website:			
Exec. Director	Name	Phone	Email
Program Director	Name	Phone	Email
Board Chair	Name	Phone	Email
Briefly explain your agency mission and how you accomplish your mission:			

Program Information		
Program Name:	Impact Area: <input type="checkbox"/> Education <input type="checkbox"/> Income <input type="checkbox"/> Health	Funding Request Amount:
In 2-3 sentences, provide a summary of your request:		
Number of individuals that will be served if funded:		
Target Population Served:		
Primary source of clients:		
Exec. Director	Signature:	
Board Chair	Signature:	

## Geographic Service Area

United Way of Abilene serves the 19 counties of West Central Texas. Please indicate the number of clients served by this program, broken down by the clients' home county, during the last calendar year.

#	County	#	County	#	County	#	County
	Brown		Fisher		Mitchell		Stephens
	Callahan		Haskell		Nolan		Stonewall
	Coleman		Jones		Runnels		Taylor
	Comanche		Kent		Scurry		Throckmorton
	Eastland		Knox		Shackelford		

## Demographic Information

Please provide age, ethnicity, and income level information in estimated percentages of total client population during the last calendar year.

Age									
	0-13 yrs		14-18 yrs		19-30 yrs		31-65 yrs		66+ yrs

Ethnicity/Race											
	African-American		Asian/Pacific Islander		Latino		Multi		Native American		White, Non-Hispanic

Low Income	
<i>Low income for the purpose of United Way's grant review process is defined as living in a household with annual income at or below 200% of the Federal Poverty Level. United Way recognizes that many organizations currently use other measures to assess need. Alternative measures, including Free &amp; Reduced School Lunch, are accepted.</i>	
	At or below 200% of Federal Poverty Level
	Unknown

Describe the population you intend to serve.
Describe those in which you will work with in this program. Include how participants will be characterized before they begin your program and include key barriers they face to achieve anticipated results of this program.

## Program Narrative – Question 1

Please provide a brief narrative of the program for which you seek funding in this application. Describe how United Way funds will be used within your program. Provide the community need or issue the program seeks to address using specific data.

## Program Narrative – Question 2

Please select the target outcome below that most closely fits your program. How will you achieve your goal? Explain how you will measure and track your outcomes.

Education	Children are safe and secure and have responsible caring adults in their lives.
	Students succeed in school.
	Students graduate and are ready for higher education or work.
	Children and youth have the tools they need to make good decisions and effectively deal with social challenges.
Income	Families have access to affordable childcare that presents opportunities for growth and development and prepares children for school.
	Families learn to budget and save money for housing, utilities, transportation, and other expenses.
	Families have access to emergency/transitional housing and basic needs services.
	Individuals have access to information, services and support that allow them to overcome challenges to be more self-sufficient.
	Community members, including the elderly, feel secure in their home and maintain quality of life.
Health	Families have access to adequate medical services.
	Families have access to nutritious meals or food supplies.
	Families develop positive habits and have resources to help them cope with challenges.



## Program Narrative – Question 3

Provide a summary of results/outcome statement for the program. Provide a success story for a participant of your program from the last year. (*Results/outcomes refer to changes in behavior or conditions of the participant based on the services you provided. Anecdotal evidence is appropriate here but is not a substitute for local measures of success.*)

## Program Narrative – Question 4

Describe how your program collaborates with other community organizations. *(The committee is interested in understanding your agency's proactive efforts, both alone and in collaboration with other programs, to contribute to community responses for local needs.)*

## Program Narrative – Question 5

Explain your request for United Way funding relative to your total budget. Provide your request for United Way funds as a percentage of your budget. If you do not receive the full amount of funding requested, how will that affect your program? Attach a copy of your anticipated 2022 budget.

## Program Narrative – Question 6

Explain any capital improvements or program changes that may impact any anticipated outcomes to this program in the future.

## Program Narrative – Question 7

Please provide a brief description of how your organization has continued to be impacted by COVID-19.

# Application Rubric

The following rubric should be used by applicants to determine appropriate narrative responses. Community Impact Review Team volunteers will use the rubric to guide their application review.

Question 1				
Poor	Fair	Satisfactory	Good	Exceptional
Response is vague and generic	Response reflects the value of services as expressed by a national agency with no supporting evidence at the local level	<p>Response reflects goals for clients</p> <p>Response clearly reflects the local efforts to improve lives</p>	<p>Response reflects goals for clients that are relevant to the services provided</p> <p>Response clearly reflects the local efforts to improve lives and achieve client goals</p> <p>Response reflects consideration of research or best practices to define or improve agency services</p> <p>Agency demonstrates a responsible plan for using UW funds</p>	<p>Response reflects a coherent, comprehensive, and integrated approach to improve lives across the agency which clearly ties into the mission</p> <p>Response reflects clear goals for clients that are relevant to the services provided in West Central Texas</p> <p>Response reflects use of research or best practices to define or improve agency services</p> <p>Agency demonstrates a responsible plan for using UW funds</p>

Question 2				
Poor	Fair	Satisfactory	Good	Exceptional
Program is not relevant to any target outcome	<p>Program has some tie to one or more outcomes</p> <p>Case for ties to target outcomes is not well made</p>	Program clearly demonstrates relevance to one or more target outcomes	<p>Program clearly demonstrates relevance to one or more target outcomes</p> <p>Program cites reputable research efforts in support of the linkage of their work and the target outcomes</p>	<p>Program clearly demonstrates relevance to one or more target outcomes</p> <p>Program cites reputable research efforts in support of the linkage of their work and the target outcomes</p> <p>Program demonstrates data tracking at the agency level that matches their own goals and is relevant to UW target outcomes</p>

<b>Question 3</b>				
<b>Poor</b>	<b>Fair</b>	<b>Satisfactory</b>	<b>Good</b>	<b>Exceptional</b>
Anecdotal evidence only	Anecdotal evidence  Non-local data regarding the successfulness of the program	Anecdotal evidence  Local data regarding program efforts with clients	Anecdotal evidence  Local data clearly demonstrates the success of the services in improving lives	Anecdotal evidence  Local data clearly demonstrates the success of the services in improving lives  Local data is strong enough to be used in UW campaign and PR materials

<b>Question 4</b>				
<b>Poor</b>	<b>Fair</b>	<b>Satisfactory</b>	<b>Good</b>	<b>Exceptional</b>
Agency does not understand similar services provided by others or how their service fits  Agency not interested in collaboration	Agency understands similar services provided by others and how its service fits	Agency understands similar services provided by others and how its service fits  Agency demonstrates desire for collaborative approaches to improve lives	Agency scans community periodically to assist in better meeting unmet or underserved needs  Agency demonstrates active search for collaboration to improve lives	Agency scans community periodically to assist in better meeting unmet or underserved needs  Agency demonstrates active search for collaboration to improve lives  Agency demonstrates in its strategic plan a vision for its future and its place within the community with appropriate consideration for other agencies

<b>Question 5</b>				
<b>Poor</b>	<b>Fair</b>	<b>Satisfactory</b>	<b>Good</b>	<b>Exceptional</b>
Budget is not clear  Significant surpluses or deficits exist without clear explanation or plans for correction  Unrealistic dependence on UW funds	Budget is not clear  Significant surpluses or deficits exist without clear explanation or plans for correction	Budget is clear  No significant surpluses or deficits exist  Significant areas of change are addressed in response  Funding request from UW is reasonable	Budget is clear  No significant surpluses or deficits exist  Significant areas of change are addressed in response  Funding request from UW is reasonable Clear explanation for level of request	Budget is clear  No significant surpluses or deficits exist  Significant areas of change are addressed in response  Funding request from UW is reasonable Clear explanation for level of request  Agency demonstrates a responsible plan for using UW funds