



United Way of Abilene

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## United Way of Abilene Application for 2023 Allocations

Funding Cycle: January 2023 – December 2023  
**Deadline:** *Tuesday, August 2, 2021 – 3:00 p.m.*

# Community Impact Review Process and Application Guidance

United Way of Abilene's Application for Community Impact Funds in the areas of Education, Financial Stability, and Health is now open.

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 our communities' intellectual, organization, institutional, financial, faith-based, and personal resources 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 the pressing needs of education, financial stability, and health. We know community challenges are multifaceted, and we endorse the strength of collaboration.

The application deadline is August 2, 2022. If approved for investment, funding will begin in January 2023 and extend through December 2023. Please refer to and retain the key dates listed in this document. All programs receiving funding in 2023 must participate in quarterly reporting to United Way through the Community Operating System.

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## Community Impact Application Process

Applications will be reviewed over several months. This process includes Site Visits, Program Presentations, and a Stewardship Review. Selected programs will be notified of their 2023 investment in mid to late December.

**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, year-to-date budget, annual audited financial statements, Form 990s, and other organizational management information.

**Site Visit:** As part of the application and review process, United Way of Abilene will bring the Allocations Team on a 20–30-minute site visit to see your program and facility. A specific date and time will be provided in advance of your visit.

**Program Presentation:** As part of the application and review process, United Way of Abilene requires applying programs to make a 30-minute presentation (15-minute presentation with Q&A). A specific time will be provided in advance of the program presentation day.

**Completed program applications must include 14 collated, hole-punched, unstapled hard copies and one electronic copy emailed to [jenn@unitedwayabilene.org](mailto:jenn@unitedwayabilene.org).**

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 use the provided applications. If using Word, please type your answers in 11 pt. Arial or similar font, add additional space as needed if completing the application using the Word document. 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 documentation. Additional documentation does not count towards the page limit.

**Please ensure mail delivery or hand delivery of your application by August 2, 2022, 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

Email submissions will not be considered a completed application. You are responsible for submitting complete applications by the deadline. **Any application not received by the deadline will not be eligible for funding.**

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## Eligibility Requirements

The organization must demonstrate competency in four main areas and 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 to apply for and receive funding from United Way of Abilene's Allocations 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 offer financial stability, health, education, or human-service-related programs and directly serve individuals in Taylor and/or surrounding counties.
- Have an independent governing body consisting of at least nine voting members 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.

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## Key Dates

Application for Community Impact Released	Tuesday, June 14, 2022
Application for Community Impact Funds Due	Tuesday, August 2, 2022; 3:00 p.m.
Allocations Program Presentations	Tuesday, August 30, 2022
Allocations Site Visits	Thursday, September 1, 2022 Wednesday, September 14, 2022
Stewardship Application Due	September 6, 2022; 3:00 p.m.
Notification of 2023 Investment Decision	Mid to late December 2022

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## 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 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. Two volunteer committees will review all submitted applications – the Allocations and Stewardship Review Teams 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 the Allocations and Stewardship Review Teams, United Way of Abilene's Board Chairs will make recommendations to the Executive Committee, considering 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 2022. 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, volunteer committees, and staff, programs may be invited to enter the 3-year cycle or may be reviewed more frequently.**

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 the target population and the strategies used for engagement.
- 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 the viability of the program in the short and medium terms.
- A financially sound and programmatically appropriate budget.

Programs that are awarded 2023 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 as specified within the Agreement, and
- 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 the program meets its performance targets and that 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 325-677-1841.

# 2023 Allocations Funding Request

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:		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"/> Financial Stability <input type="checkbox"/> Health
Funding Request Amount:	
Number of individuals that will be served if funded:	
Primary source of clients:	
Exec. Director	Signature:
Board Chair	Signature:
The above signed hereby certify: <ul style="list-style-type: none"><li>• The program and budget information in this application is true and correct to the best of our knowledge.</li><li>• If approved for continued funding, we agree to abide by the United Way of Abilene Community Partner Agreement.</li></ul> This application has been duly authorized and approved by the agency's Board of Directors.	

## 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 the 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		Hispanic/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 an annual income at or below 200% of the Federal Poverty Level. United Way recognizes that many organizations currently use other measures to assess needs. Alternative measures, including Free &amp; Reduced School Lunch, are accepted.</i>	
	At or below 200% of the Federal Poverty Level
	Unknown

Describe the population you intend to serve.
Describe the population(s) you work with for this program. Include how participants will be characterized before they begin your program and include any key barriers they may face to achieve the anticipated results of this program.

**Racial Disparity**

Is your program intended to address, or does your program address, a specific racial disparity? (Examples: third grade reading proficiency gap between White and BIPOC\* students |income inequities between White and BIPOC\* residents)?

<input type="checkbox"/>	Yes
<input type="checkbox"/>	No

*If yes, please describe how your program addresses one or more identified racial disparities.*

**Program Narrative – Question 1**

Please provide a brief narrative of the program for which you seek funding. 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 up to three 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	
<input type="checkbox"/>	Children are safe and secure and have responsible caring adults in their lives.
<input type="checkbox"/>	Students succeed in school.
<input type="checkbox"/>	Students graduate and are ready for the next grade level or work.
<input type="checkbox"/>	Children and families have the tools they need to make good decisions and effectively deal with social challenges.
<input type="checkbox"/>	Families have access to childcare that presents opportunities for growth and development.
<input type="checkbox"/>	Children are enrolled in or have access to safe, quality childcare and early education/learning.
Financial Stability	
<input type="checkbox"/>	Families have access to affordable childcare allowing them to work or attend school.
<input type="checkbox"/>	Families learn to budget and save money for housing, utilities, transportation, and other expenses.
<input type="checkbox"/>	Families have access to emergency/transitional housing and basic needs services.
<input type="checkbox"/>	Individuals have access to information, services, and support that allow them to overcome challenges to be more self-sufficient.
<input type="checkbox"/>	Community members, including the elderly, feel secure in their homes and maintain their quality of life.
Health	
<input type="checkbox"/>	Families have access to adequate medical services.
<input type="checkbox"/>	Families have access to nutritious meals or food supplies.
<input type="checkbox"/>	Families develop positive habits and have resources to help them cope with challenges.



### Program Narrative – Question 3

Report the total unduplicated participants served by this program:

2021 Actual:	
Year to Date 2022:	
2022 Projected:	
2023 Proposed:	

### Program Narrative – Question 4

Explain your request for United Way funding relative to your total budget. If you do not receive the full amount of funding requested, how will that affect your program? Attach a copy of your anticipated 2023 budget.

What percentage of your program budget is the United Way request for funding?	
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### Program Narrative – Question 5

Describe how your program collaborates with other community organizations. *(What are your agency's proactive efforts, both alone and in collaboration with other programs, to contribute to community responses to local needs.)*

## **Program Narrative – Question 6**

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