

2020-2021 Community Investment Fund Application Instructions

To apply for funding, you must:

- Submit the Notice of Intent to Apply (link on website) no later than March 9, 2020.
- Attend one Applicant Workshop (dates on website), in person or remotely via GoToMeeting. The meeting link(s) will be posted closer to the workshop dates.
- **Submit via email to grants@unitedwayvictoria.org no later than 5p on Monday, April 20, 2020** the following application items and attachments:
 - 1.) Community Investment Grant Application (download from website)
 - 2.) 20-21 Applicant Financial Data Workbook (download from website)
 - 3.) Attachments:
 - A1.) Signature Page (download from website)
 - A2.) Audit for most recently completed fiscal year
 - A3.) 990 for most recently completed fiscal year
 - A4.) Board Roster (Names and business affiliation of your organization's governing Board of Directors; identify officers and terms)

Website: <https://www.unitedwayvictoria.org/request-proposals>

Email for questions and final submission: grants@unitedwayvictoria.org

Additional Instructions:

Notice of Intent to Apply – Last day to submit: March 9, 2020

The link takes you to a brief survey with questions that will help us understand who is applying, in what area, and at what amount. It will also help determine if your organization meets the requirements for funding consideration before you get too far into the application process. We encourage you to submit this as soon as possible; we will respond within two (2) business days to each Notice received.

You will need to attach your IRS 501(c)(3) Designation letter and answer questions concerning audits and policies. Please be prepared as you cannot save your work at this link.

Community Investment Grant Application

The application is a fillable PDF. Adobe Acrobat Pro DC is the ideal software for working and saving, but Adobe Acrobat Reader DC should work, as well. When you complete a response box then save and come back later, you may not see your entire response in the box. Just click on the + at the bottom right corner of the box, and a toggle bar will appear. For ease of editing and spellcheck, we do suggest

copying and pasting from a Word document. This may also ease worries if you have had trouble saving PDFs in the past.

Section 1 – Organization Information

This section is all Organizational information.

The Operating Budget should reflect your current fiscal year budget, for the full organization.

Section 2 – Contact Information

If your Executive Director is also the person we should contact in reference to the application and grant process, you can leave the Grant Contact information blank. The Executive Director information is REQUIRED, either way.

Section 3 – Program Information

This section is background information on the specific program within your organization for which you are seeking funding. While we will ask for details later in the application, please keep in mind that United Way is funding something specific within your organization. While it may be general operating, it is general operating in support of something. If you would like help clarifying, please reach out no later than April 10th to grants@unitedwayvictoria.org to schedule a technical assistance call.

Section 4 – Funding Priority Area

This is program-specific. We will discuss the Impact Areas in more detail during the Applicant Workshops.

Program Narrative

Sections P1-P4

These sections are Program-specific. The questions are detailed with additional information beneath many of the response boxes. We will have an open Q&A time specific to this section during the Applicant Workshops but welcome questions thru April 10th at grants@unitedwayvictoria.org. Please know that those questions and answers may be used to create a FAQ that will be shared on the website.

Section P5

Complete the **P5 - Stats and Unit Cost** tab in the *20-21 Applicant Financial Data Workbook*.

The Service Statistics and Demographics are Program-Specific. This data request is mostly consistent with the prior year's application for ease of data transfer.

The Unit of Service is also Program-Specific and consistent with the prior year's application. We understand this section has caused issues in the past. We plan to discuss Unit of Service in detail during the Applicant Workshops.

Budget - 20-21 Applicant Financial Data Workbook

Note throughout workbook: we understand that not everyone's fiscal year for which the 19-20 funding coincides will be complete at time of application. So, we know that 19-20 Actuals may actually be 19-20 Estimated. We should be able to tell this by your fiscal year, but we will reach out individually with questions, as needed.

Section B1 – Program Budget

Complete the B1-Program Budget tab in the 20-21 Applicant Financial Data Workbook. This tab is all Program-Specific. The Expenses section includes a line item that is not included in the organizational budget → Administrative Costs. This is intended to include allocated amounts of non-program staff and related costs for those positions (FICA, benefits, WC, etc).

If you include an amount in Other Expenses or Other Income, you must complete the Explanation at bottom of page. Also, InKind Revenue and InKind Expenses should always match.

Section B2 – Organizational Budget

Complete the B2-Org Budget tab in the 20-21 Applicant Financial Data Workbook. This tab reflects financial data for the full Organization.

Reminder, if you include an amount in Other Expenses or Other Income, you must complete the Explanation at bottom of page. Again, InKind Revenue and InKind Expenses should always match. Lastly, please explain Excess or Deficit, as needed, in the space given.

Section B3 – Historical Information

Complete the B3-Org Historical & Overhead tab in the 20-21 Applicant Financial Data Workbook. This tab is reflective of the full Organization and will help our reviewers better understand the financial health of your organization. You will need your Audit and your 990 to complete this tab. The line items are general to most audits. As this is a newer requirement, we are happy to provide technical assistance through April 15th. Request assistance via email at grants@unitedwayvictoria.org.

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