

United Way of Indian River County Funding Eligibility Guidebook



Overview

United Way of Indian River County provides non-restrictive grant funding to health and human service organization programs based on their ability to impact areas of need identified by the United Way of Indian River County and its Vision Councils. Any organization currently providing a program to IRC residents that measures outcomes and indicators set forth in the Education Impact Area and meets current eligibility criteria is eligible to apply for 2023-2025 grant funding.

The Education Impact Area has set Community Goals which correspond with outcomes and indicators that programs must be able to measure in order to apply for funding. An overview of the Impact Area goals, and corresponding outcomes is available on the UWIRC website, e-CImpact funding portal or upon request. Any organization interested in applying must be able to measure a minimum of two outcomes and at least one indicator for each outcome from the list.

Admission is competitive; United Way evaluates programs on their ability to provide the highest quality services which best address the key outcomes identified by United Way of Indian River County Vision Councils and the Board of Directors.

Please carefully review this document to confirm eligibility. Current or previous United Way of Indian River County funding is not an automatic guarantee of eligibility.

The Grant Application is accessed through a web-based platform called e-CImpact (link below). All forms, unless stated otherwise, are completed online. Training can be provided to answer specific questions and provide guidance for the application and site visit.

Website Link: <https://agency.e-cimpact.com/login.aspx?org=11450F>

Who Can Apply?

- Programs that are currently being funded

- New programs from currently funded partners
- New programs from non-funded agencies
- New programs from currently funded partners and non-funded partners are only eligible for one-year funding. In order to move to a two-year funding agreement, the program must have one-year of satisfactory outcome performance and relationship with UWIRC

Funding Parameters

- New agencies and new programs from currently funded partners requesting funding are capped at \$20,000 and UWIRC funding cannot exceed 50% of program budget
- Those Agencies that have not applied for United Way IRC funding previously or those agencies that have been previously defunded are subject to an Agency vetting process prior to program review
 - Agency volunteers that must attend a vetting meeting include the Board Chairperson, Treasurer, and one additional governing board member. From Agency staff attendance from CEO/Executive Director, Finance Director and Development Director or Program Director are required
- United Way of Indian River County funds programs within agencies rather than the overall agency. Funding is distributed on a July 1- June 30 cycle, although programs are not required to operate on the same fiscal year
- New and current programs compete for the same funding
- Community Impact Council (CIC) will review reports at the end of year one to determine if the program needs to re-apply based on program, organizational, financial or outcome adjustments that have been made
- No program, regardless of whether it has received funding in the past, is guaranteed funding
- Funding is allocated in one and/or two-year cycles
- The funding amount awarded the first year continues for a second year. For example: If Program A is awarded \$10,000 it will receive \$10,000 the first year, \$10,000 the second year provided it maintains the same standards of performance and funding to support the grant has been raised by United Way of Indian River County. A midyear and a year-end report are required. All funding is subject to adjustments based on United Way of Indian River County campaign results

Agency Requirements

Any program applying for grant funding must meet all the following program and agency requirements:

- The agency must be a charitable, not-for-profit organization or public entity (e.g., town department, school district, etc.), and must be tax exempt under Section

- 501(c) (3)** of the Internal Revenue Service Code at the time of application and continue to adhere to the ongoing requirements of Section 501(c)(3)
- The agency must provide services in Indian River County residents
 - The agency must be registered with the State of Florida Dept. of Agriculture & Consumer Services
 - The agency must have Articles of Incorporation
 - The agency must have Bylaws which include:
 - Term Limits/Rotation of Board of Directors
 - Regular Meeting Schedules
 - Board responsible for hiring qualified executive director
 - The agency has a volunteer Board of Directors meeting the following:
 - The agency has a volunteer Board of Directors that receives no financial remuneration
 - The agency Board meets at least quarterly and maintains minutes of all meetings
 - Board members may not be related to the Executive Director or agency staff
 - At least one Indian River County resident serves on the Governing Board
 - The duties and responsibilities of the Board are defined in writing
 - The agency has written personnel policies, guidelines and job descriptions for program staff and volunteers, including an Organizational Chart
 - The agency has a written and enforced affirmative action plan, grievance procedure, non-discrimination policy, and sexual harassment policy
 - The agency has an established Code of Ethics, Whistleblower Policy, and Document Retention and Destruction Policy as per Sarbanes-Oxley legislation
 - Agencies must have an effective fiscal management system in place and have the fiscal capacity to administer grant funds
 - The Agency must maintain any required Legal Licenses, Agency Certifications & Accreditations
 - Agencies funded by United Way of Indian River County must submit financial documentation:
 - Latest Audit which conforms with the AICPA Guide for agencies with annual operating budgets of \$100,001 or more. Agencies with annual operating budgets of \$100,000 or less may submit a financial review in lieu of an audit
 - Management Letter
 - Agency's Response to Management Letter
 - Most Recent IRS Form 990, Including All Schedules
 - Most recent internal financial statement, i.e. Balance Sheet and Operating Budget
 - Most Recent Annual Report (If Available)
 - Agency's Strategic Plan (If Available)
 - Agency Succession Plan for ED/CEO and/or Key Program Staff
 - Board minutes for the past twelve months

Program Determination Guidelines

These criteria should be used by agencies to help distinguish programs from services; all are required for a program to qualify for funding.

- A program is a defined group of services with clearly focused and attainable client outcomes
- The program must have clearly stated client-based objectives and activities that directly impact and resolve a specific client need or problem
- Program client outcome results are measurable and based on credible and reliable measurement tools
- The program must be an established and distinct component of agency operations with a related set of policies and procedures. Programs applying for funding may not be a component of a larger program
- The program must have its own functional budgeting, cost accounting, service measurement, and program review that are distinctly separate from the agency Program expenses must be clearly separate from agency expenses. Exceptions would be only in cases where the agency has a sole program and purpose
- The program must have a set of ongoing associated activities that support a primary mission of the agency as stated in its articles of incorporation, by-laws, statement of purpose, board actions, board minutes, or other documents
- The program must employ the *equivalent* of at least one full-time staff person's work

Mandatory Program Management Requirements

The program must be a health and human service program that clearly measures the outcomes and indicators for the current year's Impact Area goals. The Education outcome & indicators for this year's grant cycle are included in this packet. Programs will need to select a minimum of two outcomes with a minimum of one indicator for each outcome.

- The program requesting admission must be in operation and serving clients for at least one year prior to the date of application and able to show a program operating budget and all program requirements for the year prior to application
- The program must serve primarily low-income, high-risk, or "ALICE" clients in Indian River County
- Program must be able to show funding source diversity. Funding requests cannot represent more than 50% of a program's budget. United Way funding cannot represent more than 50% of the program's budget at any time during the grant life cycle
- Program operations must employ at least one full-time staff person or full-time equivalent. This requirement may be fulfilled by a volunteer that performs the same types of duties as paid staff and volunteers the equivalent in staff hours. Programs must have a full-time equivalent at the time of the grant request and throughout the life cycle of the grant

- Program services, where applicable, must meet all current licensing or accreditation requirements
- Program does not require clients to participate in religious activities as a requirement for receiving program services

Funding Application Process

Step 1: Letter of Intent

The Letter of Intent (LOI) will determine a program's ability to comply with eligibility criteria. Programs will be notified if they are eligible to continue the application process after submission. The LOI is accessed through a web-based platform called e-CImpact (link below). All forms, unless stated otherwise, are completed online. Training can be provided to answer specific questions and provide guidance for the application and site visit.

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Step 2: Full Funding Application

Programs that meet criteria and are approved to continue the application process will be given access to the grant application. The Grant Application is accessed through a web based platform called e-CImpact (link below). All forms, unless stated otherwise, are completed online. Training can be provided to answer specific questions and provide guidance for the application and site visit.

Website Link: <https://agency.e-cimpact.com/login.aspx?org=11450F>

New Agencies to UWIRC: If you are not a currently Funded Partner your Agency will be considered a new agency and must first be reviewed, including meetings with professional and volunteer leadership. UWIRC staff will contact the Agency to coordinate this meeting. Following the Agency review, your program will then be evaluated on the ability to meet the Community Impact outcomes set forth by UWIRC.

Step 3: Application Review and Presentations

Once a full funding application is submitted and there has been a thorough agency and program review, applicants move on to step three. This step of the application process involves Indian River County citizen panel review and a site visit presentation. Programs are reviewed, evaluated by Citizen Review Panels comprised of diverse community volunteers. Each eligible program is expected to present to the panel. Further details about program presentations are sent prior to the site visit date.

Step 4: Funding Recommendations

After panels have reviewed all programs, they make funding recommendations to the Community Impact Council and the UWIRC Board of Directors. Programs recommended and approved for funding will begin their first year of funding on July 15, 2023. Agencies receiving United Way of Indian River County funding must sign and agree to follow the United Way of Indian River County Memorandum of Agreement.

Timeline

| | |
|-----------------------|--|
| October 17, 2022 | Letter of Intent (LOI) Open |
| November 13, 2022 | LOI Deadline – due by 4:00pm (*late applications will not be accepted) |
| December 2, 2022 | New Agency Vetting Binders Due |
| Dec. 2022 – Jan. 2023 | New Agency Vetting (*new agencies will be contacted to set up a meeting with UW staff and volunteers) |
| January 11, 2023 | Mandatory Application Training for Agencies |
| January 16, 2023 | Education Grant Application Open |
| February 13, 2023 | Application Deadline – due by 4:00pm (*late applications will not be accepted) |
| February-March 2023 | Governance and Financial Review of Grant Applicants |
| April 2023 | Site Visits by United Way Citizen Review Panels |
| May 2023 | Final Recommendations Made and Approved by UWIRC Board of Directors (*agencies notified of funding status) |
| July 15, 2023 | Funding Begins (*funding will begin in April 2024 for programs that operate only during the summer) |

Please Note that all dates are subject to change



United Way of Indian River County

United Way of Indian River County Priority Ranking Matrix for Outcomes

| | Early Learning | School Success | Academic Success | Graduate for Success | |
|---|---|---|--|--|---|
| | <p>All children are nurtured by caregivers who promote early learning and development to prepare them for Kindergarten.</p> <p>Community Goal to increase to 85% the children who enter Kindergarten ready to Succeed.</p> <p>School Readiness/Early Learning (0-5)</p> | <p>Students will continue to stay on track for High School Readiness.</p> <p>Community Goal to increase to 90% the 3rd Graders who are performing on Grade Level and increase their positive behaviors.</p> <p>Early Grade Success (6-10)</p> | <p>All children succeed and achieve in school.</p> <p>Middle School Success (11-14)</p> | <p>Students graduate high school on time prepared for continuing education, work and life.</p> <p>Community Goal to increase to 90% the students who graduate on time from High School.</p> <p>High School Success (15-18)</p> | |
| P R I O R I T Y # 1 | Provide high quality early childhood education. | Provide quality and engaging opportunities for elementary school students that reinforce and enhance academic learning (Math, Science, Reading). | Provide quality and engaging opportunities for middle school students that reinforce and enhance academic learning (Math, Science, Reading). | Provide quality and engaging opportunities for High School students that reinforce and enhance academic learning (Math, Science, Reading). | Programs selecting these outcomes are eligible to receive up to 100% of their request. |
| | | Promote and coordinate activities that reduce summer learning loss for elementary school students. | Promote and coordinate activities that reduce summer learning loss for middle school students. | Provide quality and engaging opportunities for High School students that reinforce and enhance social/emotional learning. | |
| | | Provide quality and engaging opportunities for elementary school students that reinforce and enhance social/emotional learning. | Provide quality and engaging opportunities for middle school students that reinforce and enhance social/emotional learning. | Provide quality and engaging opportunities for High School students that reinforce and enhance social and decision making skills. | |
| P R I O R I T Y # 2 | Provide supportive services for students and families that increase parent engagement, promote learning and reduce school absence. | Provide supportive services for students and families that increase parent engagement, promote learning and reduce school absence. | Provide supportive services for students and families that increase parent engagement, promote learning and reduce school absence. | Provide Vocational and skill based training for High School Students. | Programs selecting these outcomes are eligible to receive up to 80% of their request. |
| P R I O R I T Y # 3 | Provide resources and supports to families that strengthen interactions and promote early learning in a home environment from birth. | Connect students with a Mentor to provide support in academics, emotional, recreational and goal setting. | Connect students with a Mentor to provide support in academics, emotional, recreational and goal setting. | Connect students with a Mentor to provide support in academics, emotional, recreational and goal setting. | Programs selecting these outcomes are eligible to receive up to 60% of their request. |
| | | Improve the quality of training and professional development for elementary teachers. | Improve the quality of training and professional development for Middle School teachers. | Prepare High School students to graduate with a post-secondary plan in place. | |
| | Improve the quality of training and professional development for early care and education providers. | Provide quality and engaging afterschool/out-of-school opportunities for elementary school students. | Provide quality and engaging afterschool/out-of-school opportunities for middle school students. | | |

Priority #1 Outcomes & Indicators

Early Learning

Outcome: Young children improve literacy, communication and critical thinking abilities.

young children who acquire and utilize increasingly complex phrases, sentences, and vocabulary
young children who improve critical thinking skills such as predicting, asking and answering questions, and retelling a story
young children demonstrating developmentally appropriate language skills for their age
young children demonstrating developmentally appropriate cognitive skills for their age

Outcome: Young children have access to high quality early learning experiences in home, community and early childhood care and education settings which prepare them to enter school ready to learn.

children meeting or exceeding developmental milestones
children passing social-emotional questionnaire or screening

Outcome: Young children improve positive age appropriate social and emotional skills.

young children who take increasingly appropriate action to meet and communicate their needs
young children who increasingly recognize and regulate their emotions, impulses, and behavior
young children demonstrating developmentally appropriate social emotional skills for their age

Outcome: Young children improve motor skills needed to explore their environment and support learning.

young children who improve fine and gross motor skills, and/or coordination.
young children demonstrating developmentally appropriate physical (fine & gross motor) skills for their age

School Success

Outcome: Children develop habits and skills that will help them succeed now and in the future.

children who demonstrate their age appropriate ability to manage time, plan projects and solve problems.

Outcome: Children perform at or above grade level in core subjects.

children below grade level standards at beginning of the program who make measureable gains in English language arts.
children below grade level standards at beginning of the program who are at or above grade level standards in English language arts at the end of the program
children who do not lose English language arts and/or math and/or science knowledge over the summer
children below grade level standards who make measurable gains in math and/or science
children below grade level standards in math and/or science at beginning of the program who are at or above grade level standards at the end of the program

Outcome: Children resist peer pressure to participate in unsafe activities.

children who can differentiate positive and negative peer interactions
children who improve their ability to say no when asked to participate in an unsafe or unhealthy activities

Graduate for Success

Outcome: Youth develop habits and skills that will help them succeed now and in the future.

youth who demonstrate their age appropriate ability to manage time, plan projects and solve problems
youth who increase involvement and/or develop leadership in school and/or community

Outcome: Youth perform at or above grade level in core subjects.

youth below grade level standards at beginning of the program who make measurable gains in English language arts
youth below grade level standards at beginning of the program who are at or above grade level standards in English language arts at the end of the program
youth who do not lose English language arts and/or math and/or science knowledge over the summer
youth below grade level standards who make measurable gains in math and/or science
youth below grade level standards in math and/or science at beginning of the program who are at or above grade level standards at the end of the program

Outcome: Youth prepare for adult career and/or education.

youth who identify post graduation opportunities, understand what is required to attain those opportunities and take steps to meet them
youth who have improved career related skills.

Priority #2 Outcomes & Indicators

Early Learning

Outcome: Young children improve literacy, communication and critical thinking abilities.

young children who engage with books with improved purpose and understanding

Early Learning (con't)

Outcome: Young children have access to high quality early learning experiences in home, community and early childhood care and education settings which prepare them to enter school ready to learn.

parents/caregivers who engage in educational and/or supportive programming

School Success

Outcome: Children develop habits and skills that will help them succeed now and in the future.

children who have been absent and/or tardy for any reason five or more times a semester who improve attendance

Outcome: Parents support the school requirements for reading, homework and attendance and actively participate in the education of their children.

parents who promote reading at home

parents who assist youth in improving attendance, behavior, and/or homework completion

parents who improve regular school communications and/or participation in school events that link to learning and positive youth development

Graduate for Success

Outcome: Youth develop habits and skills that will help them succeed now and in the future.

youth who have been absent and/or tardy for any reason five or more times a semester who improve attendance

youth who improve homework completion rates

Priority #3 Outcomes & Indicators

Early Learning

Outcome: Parents foster positive growth & development in their child through age appropriate parenting.

parents/caregivers who demonstrate positive family/group dynamics

parents/caregivers who are able to respond appropriately to developmental milestones

parents/caregivers who recognize and respond appropriately to the emotional needs of their child

Outcome: Parents engage with children in ways that promote learning from birth.

parents/caregivers who promote language development through consistent verbal interactions

parents/caregivers who promote early literacy through daily reading

parents/caregivers who engage in meaningful and appropriate play activities

parents/caregivers who engage in Kindergarten readiness skill building activities

School Success

Outcome: Children develop habits and skills that will help them succeed now and in the future.

children who improve homework completion rates.

Graduate for Success

Outcome: Parents know the requirements for graduation if their child is on track to meet them and how to get the necessary help for their child.

parents regularly check their child's performance (academic, attendance and behavior) to ensure that they are on track to graduate

parents understand and know how to leverage school and /or community resources to assist their struggling child

parents improve regular school communication and/or participate in school events that link to learning and positive child development.

Outcome: Parents/Mentors set appropriate expectations, help their child with goal setting and planning for the future.

parents/mentors actively assist child in setting goals and establishing post-graduation plans

parents/mentors set clear expectations and appropriate consequences which reinforce positive student behavior, motivation, achievement, and development