UNITED WAY
Indian River County

FUNDING ELIGIBILITY GUIDEBOOK

2027-2029

United Way of Indian River County
1836 14th Avenue, Vero Beach, FL 32960
(772) 567-8900
UnitedWayIRC.org

TABLE OF CONTENTS

Overview 1
Who Can Apply 2
Funding Parameters 2
Agency Requirements 3
Program Determination Guidelines 4
Mandatory Program Management Requirements 4
Funding Application Process 5
Timeline 6
Addendum A: Education Outcomes and Indicators 7-10
Addendum B: New Agency Vetting 11

OVERVIEW

United Way of Indian River County (UWIRC) provides non-restrictive grant funding to health and human service organization programs based on their ability to impact areas of need identified by the UWIRC. 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 2027-2029 grant funding.

The Education Impact Area has set outcomes and indicators that programs must be able to measure to apply for funding. An overview of the Impact Area outcomes is available in Addendum A of this document. 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; programs are evaluated on their ability to provide the highest quality services which best address the key outcomes identified by UWIRC and the Board of Directors.

Please carefully review this document to confirm eligibility. Current or previous UWIRC funding is not an automatic guarantee of eligibility.

The entire grant process 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

For more information, please contact Deana Shatley at Deana.Shatley@UnitedWayIRC.org or (772) 567-8900.

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. 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 and current programs compete for the same funding.
- New agencies and new programs from currently funded partners requesting funding are capped at $20,000.
- UWIRC funding cannot exceed 50% of the program budget.
- Agencies that have not applied for UWIRC funding previously or agencies that have been previously defunded are subject to an Agency Vetting Process prior to being eligible to complete the full grant application.
- UWIRC funds programs 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.
- Funding is allocated in one and/or two-year cycles.
- The Community Impact Committee (CIC) will review reports at the end of year one to determine if the program will receive year two funding based on program, organizational, financial or outcome adjustments that have been made.
- The funding amount awarded the first year continues for a second year if all expectations are met.
- No program, regardless of whether it has received funding in the past, is guaranteed funding.
- All funding is subject to adjustments based on UWIRC's annual campaign.

AGENCY REQUIREMENTS

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

- Agency must be a charitable, not-for-profit organization 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).

- Agency must provide services to Indian River County residents.

- Agency must be registered with the State of Florida Dept. of Agriculture & Consumer Services

- Agency must have
    - Articles of Incorporation
        - Term Limits/Rotation of Board of Directors
        - Regular Meeting Schedules
        - Board responsible for hiring qualified Executive Director/CEO
    - A volunteer Board of Directors meeting the following:
        - Board of Directors receives no financial remuneration.
        - Board of Directors meets at least quarterly and maintains minutes of all meetings.
        - Board members may not be related to the Executive Director/CEO or agency staff.
        - A minimum of one Indian River County resident must serve on the Governing Board.
        - Duties and responsibilities of the Board of Directors are defined in writing.

    - Personnel policies, guidelines, organizational chart, and job descriptions for program staff and volunteers.
    - Written and enforced equal opportunity employer policy grievance procedure, non-discrimination policy, and sexual harassment policy.
    - An established Code of Ethics, Whistleblower Policy, and Document Retention and Destruction Policy as per Sarbanes-Oxley legislation.
    - An effective fiscal management system in place and have the fiscal capacity to administer grant funds.

- Agency must maintain any required Legal Licenses, Agency Certifications & Accreditations.

- Agencies funded by UWIRC must submit the following documentation:
    - Financial Documents
        - Latest Audit which conforms with the AICPA Guide for agencies with annual operating budgets of more than $100,000. Agencies with annual operating budgets of $100,000 or less may submit a financial review in lieu of an audit.
        - Management Letter (if applicable)
        - Agency's Response to Management Letter (if applicable)
        - 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
    - 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 the 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. The Education outcomes & indicators for this year's grant cycle are included in this packet (Addendum A). 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 (Asset Limited Income Constrained Employed) 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 lifecycle.
- 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 be utilized to determine a program's ability to comply with UWIRC eligibility criteria. Programs will be notified if they are eligible to continue the application process after submission and review.

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.

New Agencies: Agencies that meet eligibility criteria and are not a currently Funded Partner, are required to go through a full New Agency Vetting process by UWIRC professional and volunteer leadership. The New Agency Vetting process is outlined in Addendum B.

Step 3: Application Review and Site Visit

Once a full funding application is submitted and there has been a thorough fiscal and governance review, applicants move on to step three. This step of the application process involves site visits by UWIRC Citizens' Review Panels. Programs are reviewed and evaluated by Citizens' 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 2026. Agencies receiving United Way of Indian River County funding must sign a Memorandum of Agreement.

TIMELINE

November 6, 2026	Letter of Intent (LOI) Open
December 2, 2026	LOI Deadline – due by 4:00pm **(*late applications will not be accepted)**
December 17, 2026	New Agency Vetting Information Due
January 2027	New Agency Vetting **(*new agencies will be contacted to set up a meeting with UWIRC staff and volunteer leadership)**
January 25, 2027	Grant Application Opens **(training video will be sent to all applying)**
February 22, 2027	Application Deadline – due by 4:00pm **(*late applications will not be accepted)**
March 2027	Governance and Financial Review of Grant Applicants
April 2027	Site Visits by United Way Citizens' Review Panels
May 2027	Final Recommendations Made and Approved by UWIRC Board of Directors **(*agencies notified of funding status)**
July 2027	Funding Begins **(*funding will begin in April 2026 for programs that operate only during the summer)**

PLEASE NOTE ALL DATES ARE SUBJECT TO CHANGE

ADDENDUM A: EDUCATION MATRIX & OUTCOMES

Early Learning	School Success		Graduate for Success
All children are nurtured by caregivers who promote early learning and development to prepare them for Kindergarten.	Students will continue to stay on track for high school readiness.	All children succeed and achieve in school.	Students graduate high school on time prepared for continuing education, work and life.
School Readiness/ Early Learning (0-5)	**School Success: Elementary and Middle School (6-14)**		**High School Success (15-24)**
Provide high quality early childhood education.	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).
	Promote and coordinate activities that reduce summer learning loss for elementary 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 High School students that reinforce and enhance social and decision making skills.
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.
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.
	Improve the quality of training and professional development for elementary 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.		Improve the quality of training and professional development for early care and education providers.

ADDENDUM A: EARLY LEARNING OUTCOMES (AGES 0-5)

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

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

- #/% of parents/caregivers engaging in educational and/or supportive programing
- #/% of early childhood staff trained to provide quality programming

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

- #/% Young children passing social-emotional questionnaire or screening
- #/% Young children referred for additional services, as identified by screening, to improve positive age appropriate social and emotional skills.

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

- #/% of young children meeting or exceeding developmental milestones
- #/% of young children who improve fine and gross motor skills, and/or coordination.
- #/% of young children demonstrating developmentally appropriate physical (fine & gross motor) skills for their age
- #/% of young children referred to additional services, as identified by developmental screening

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

- #/% of parents/caregivers who are able to respond appropriately to developmental milestones
- #/% of parents/caregivers who recognize and respond appropriately to the emotional needs of their child

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

- #/% of parents/caregivers who promote early literacy through daily reading
- #/% of parents/caregivers who engage in meaningful and appropriate play activities
- #/% of parents/caregivers who engage in Kindergarten readiness skill building activities

ADDENDUM A: SCHOOL SUCCESS OUTCOMES (AGES 6-14 | ELEMENTARY & MIDDLE SCHOOL)

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

- #/% of children who demonstrate their age appropriate ability to manage time, plan projects and solve problems.
- #/% of children who improved homework completion rates
- #/% of children/youth served who maintain satisfactory or improve school attendance
- #/% of middle youth served who develop soft skills

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

- #/% of children below grade level standards at beginning of the program who make measurable gains in English language arts.
- #/% of 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
- #/% of children below grade level standards who make measurable gains in math and/or science
- #/% of 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
- #/% of children served who are proficient on school readiness assessments by the end of their kindergarten year
- #/% of children (K-3) served reading at grade level
- #/% of middle school youth served who earn passing grades in core subject areas
- #/% of middle school youth served who transition from middle to high school on time
-

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

- #/% of parents/caregivers who promote reading at home
- #/% of parents/caregivers who assist youth in improving attendance, behavior, and/or homework completion

ADDENDUM A: GRADUATE FOR SUCCESS OUTCOMES (AGES 15-24)

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

- #/% of youth who demonstrate their age-appropriate ability to manage time, plan projects and solve problems
- #/% of youth who increase involvement and/or develop leadership in school and/or community
- #/% of youth who improve homework completion rates
- #/% of youth served who maintain satisfactory or improve school attendance

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

- #/% of youth below grade level standards at beginning of the program who make measurable gains in English language arts
- #/% of 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
- #/% of youth below grade level standards who make measurable gains in math and/or science
- #/% of 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
- #/% of high school youth served who earn passing grades in core subject areas

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

- #/% of youth who identify post-graduation opportunities understand what is required to attain those opportunities and take steps to meet them
- #/% of youth who have improved career related skills.
- #/% of youth served who gain post-secondary education or credentials
- #/% of youth served who receive job skills training
- #/% of youth (15-24) served who gain employment, internship or apprenticeship
- # of youth served who graduate high school on time

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

- #/% of parents/caregivers who regularly check their child's performance (academic, attendance and behavior) to ensure that they are on track to graduate
- #/% of parents/caregivers who understand and know how to leverage school and /or community resources to assist their struggling child

ADDENDUM B: NEW AGENCY VETTING

New agencies that submit a Letter of Intent for United Way of Indian River County (UWIRC) funds must undergo an in-depth vetting by a committee made up of UW staff leadership and members of the United Way Board. New agencies must submit all the required documents listed below. The required documents must be uploaded to the e-CImpact web-based platform.

Submitted documents are reviewed by the Vetting Committee, which meets with the agency's board and staff leadership before a final decision is made. Agency volunteers & staff that must attend the vetting meeting include the Board Chairperson, Board Treasurer, CEO/Executive Director, Finance Director and Development Director or Program Director.

Once documents are submitted and reviewed, UWIRC's Director of Community Impact will work with the agency's primary contact to schedule the vetting meeting. If an agency is approved, they move onto the Citizens' Review

Process and complete a grant application.

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

Required Documents

- IRS 501(c) 3 Exemption Letter
- Letter from the State of Florida verifying registration with the Dept. of Agriculture & Consumer Services
- Articles of Incorporation
- Agency Bylaws, including:
    - Term Limits/Rotation of Board of Directors
    - Regular Meetings scheduling
    - Board responsible for hiring qualified Executive Director
- Agency's Written Policy Regarding Non-Discrimination
- Personnel Practices & Policies and Staff Organizational Chart
- Roster of Officers & Directors (with names and county of residence)
- Board minutes for the past twelve months
- Latest Audit which conforms with the AICPA Guide for agencies with annual operating budgets over $100,000. Agencies with annual operating budgets of $100,000 or less may submit a financial review in lieu of an audit.
- Most Recent IRS Form 990, Including All Schedules
- Most Recent Annual Report
- Agency's Strategic Plan
- Agency ED/CEO Succession Plan
- Most recent INTERNAL financial statement, i.e., Balance Sheet and Operating Budget
- Description of Programs and Services Provided, including:
    - Any recent and relevant outcomes data that are tracked.
    - Fee schedule for services (if applicable)
- Program outcomes, data, statistics, etc.
- Additional promotional brochures or other agency literature may be submitted as an addendum to the required components.