

INTRODUCTION

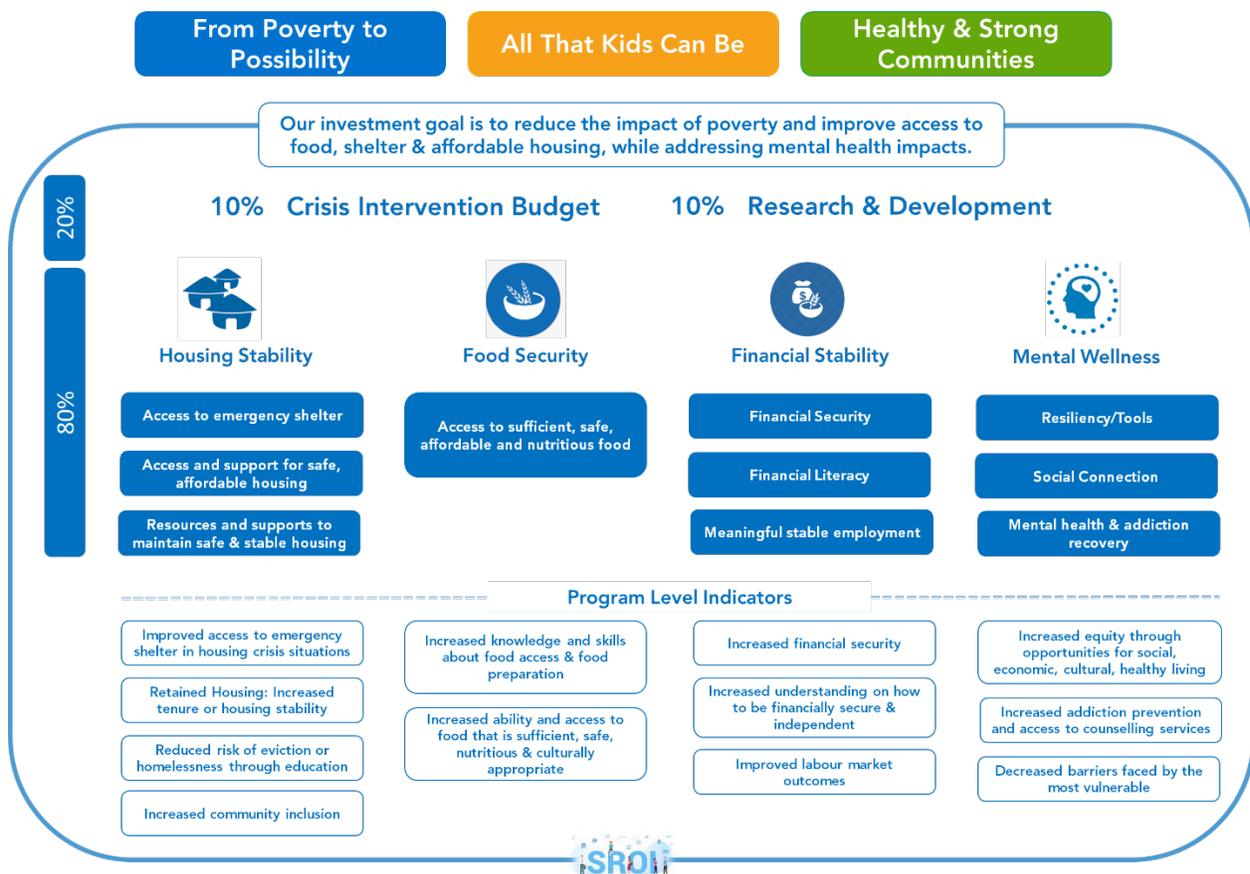
United Way Leeds & Grenville (UWLG) strives to be a leader in understanding the root causes of social issues and bringing people and resources together to find lasting solutions. UWLG works to create real change in people’s lives – meaningful, positive, change. Not just for today, but for the long term and that means a better community for us all.

By inspiring people to come together, we have the power to make a real difference in people’s lives and in our community. We seek to invest in programs that are in alignment with our Community Investment Framework and will create positive change in the lives of community members within the following 3 Pillars of Support:

1. **From Poverty to Possibility:** Meeting basic human needs and moving people out of poverty.
2. **All That Kids Can Be:** Helping children and youth reach their full potential.
3. **Strong Communities:** Strengthening community services and increasing community engagement.

UWLG is committed to working in partnership with others to achieve lasting social change on priority issues in our community.

COMMUNITY INVESTMENT FRAMEWORK – 2021/2022



Housing Stability

This vision represents a shift from managing crisis after housing has been lost to actively promoting housing stability. The goal is to prevent homelessness and to help residents who become homeless with the supports to find and keep housing.

A key element of the vision is the provision of wrap-around support services to help residents with the particular range of supports they need to find and/or retain housing. This may include immediate financial assistance to pay rent or utility arrears, but can also include help with finding housing, life skills, education/training, employment, access to mental health or addictions services, or transportation, etc.

Key Measures – Are people better off?

- Housing retention as a percentage of clients who remain housed six months after the initiation of services.
- The percentage of clients, annually surveyed, report themselves and/or their families were significantly more stable and independent. They are able to sustain and manage their finances in the longer term, and are therefore building their economic independence as well as increasing their housing stability.
- # of clients that report they are more aware of the services that are available to help them and who express an empowerment to take ongoing responsibility for their wellbeing.

Food Security

This vision represents challenging the status quo and looking at factors that influence affordability and reduce the rate of food insecurity through targeted initiatives that increase access for all citizens of Leeds & Grenville.

Research has shown that food security improves mental health, reduces risks of chronic disease, and lowers health care expenditure overall. Emphasizing the importance of safe, nutritious, culturally appropriate food will help maximize health and social benefits across our community.

The four pillars of food security are: availability, access, utilization and stability

Key Measures – Are people better off?

- Meaningful, beneficial changes experienced by participants, groups or communities associated with your program.
- # of clients that report they are more aware of the services that are available to help them and who express an empowerment to take ongoing responsibility for their wellbeing.
- Indicators derived from data collected that are specific to assessing the outcomes of the program. Demonstrated outputs such as: self-reports of coping with food insecurity or increased knowledge and skills of health food preparation or increased consumption of nutritious foods; ratings of satisfaction with level of food access, number of food baskets (or other) distributed per neighbourhood, etc.

Financial Stability

This vision focusses on helping low-to-moderate-income families find and maintain affordable housing, fight poverty and homelessness, improve access to essential requirements to sustain healthy living and to plan for a future state of financial stability.

Services that address the individual's unique financial circumstances and could include educational assistance with budgeting; credit and debt management; tax preparation, preparing for homeownership; understanding banking products and services; and learning to identify predatory financial practices. Stability Services could include case management, financial coaching and job-readiness training, as well as counseling on affordable housing options.

This could also include innovative programs that allow qualified participants to build assets and develop skills for financial self-sufficiency in pursuit of major goals, such as purchasing a home for the first time; paying for college/university or job training; or starting or expanding a small business.

Key Measures – Are people better off?

- Indicators derived from data collected that are specific to assessing the outcomes of the program. Demonstrated outputs such as completed tax returns, increased access to financial assistance programs, increased savings, increased resiliency when unplanned expenses arise, # of education sessions provided and follow-up outcomes, etc.
- Measured degree of change in "financial stability-defined" habits

Mental Wellness

This vision focusses on the following important issues affecting the well-being of vulnerable people in Leeds & Grenville: supporting and aiding mental health, substance use/addiction and violence. This strategic area aims to increase community capacity, promote relationship-building among communities, and close gaps in services through processes that place value on and supports our community's citizens' rights to self-determination and control.

This could include specific programming: education, service delivery, community engagement, information and referral, case management, housing supports, rehabilitation, employment assistance, counselling, support groups and social and recreational opportunities, and peer support services for consumers and survivors, etc.

Key Measures – Are people better off?

- Indicators derived from data collected that are specific to assessing the outcomes of the program. Proof points that demonstrate the output of the program matches the aim of it.
- Demonstrate evidence-based practices being used are showing that they improve client outcomes.

COMMUNITY INVESTMENT PROCESS

Agencies interested in applying for funding must go through United Way's Request for Proposals process. The Request for Proposal Process includes 2 stages:

1. **Expression of Interest (EOI)** – All qualified charitable organizations

EOI's are reviewed by United Way staff for alignment with United Way's focus areas and strategies. The EOIs are brought to the Community Investment Committee for review and approval. Support for a proposal at the EOI stage does not guarantee United Way funding.

2. **Request for Proposal Application** - Issued to select partners by Investment Committee

Following the EOI review, agencies will be notified if they are invited to submit a full application. The full application will be available in digital format.

Funding Approval

All funding decisions are made by UWLG's Board of Directors. UWLG's Community Investment Committee is a committee of the Board, comprised of Directors and community members who make recommendations to the Board of Directors.

Applications and results of negotiations will be reviewed by the Community Investment Committee based on the funding criteria identified above. The Community Investment Committee will make recommendations to the Board of Directors based on alignment with the funding criteria in addition to planned improvement or growth (impact) over the funding cycle period. Strategies will only be funded if the proposals clearly identify the ability to achieve the outcomes identified in the application.

Applicants will be notified of the Board of Directors' decision within approximately one month of the full application deadline.

EOI Eligibility Requirements

All agencies must meet the following eligibility requirements in order to be considered for United Way funding:

1. Be incorporated as a non-profit organization
2. Be registered as a charitable organization under the Canada Income Tax Act OR be sponsored by a charitable organization under the Canada Income Tax Act
3. Align with United Way's Community Investment Strategy
4. Agency's mission is consistent with the proposed strategy, or appropriate partners are included to successfully deliver the strategy
5. Provide programs and services in the geographic area of Leeds & Grenville
6. Carry general/commercial liability insurance in the minimum amount of \$2,000,000 and submit proof of insurance with the annual accountability reports
7. Have policies that identify risk management practices that protect vulnerable populations and provide evidence of this policy

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8. Comply with and provide evidence of the Ontario Human Rights Code in hiring practices and service delivery
9. Be governed by a volunteer Board of Directors which is responsible for the efficient and effective management of the agency's programs and budgets

If the agency is part of a regional, provincial or national organization, it must have at minimum, a local advisory committee.

- The local advisory committee must provide United Way with their specific roles and responsibilities as it relates to the agency and the rest of the organization.
- The agency must demonstrate how local volunteers influence the use of local United Way funds within the local community.
- The local advisory committee must identify how monies being provided by United Way will be spent in Leeds & Grenville.

UWLG will not support proposals seeking funding for:

- Organizations without a registered charitable number, unless sponsored by another eligible registered charitable organization. Organizations must inform United Way Leeds & Grenville if their registered charitable number is revoked for any reason.
- Registered charitable organizations sponsoring for-profit organizations or for-profit ventures.
- Primary health care services and programs.
- Government-funded programs at educational institutions and organizations including school boards, schools, universities, parent-teacher associations etc.
- Faith based organizations, political parties, or organizations that require an adherence to or promotion of a religious faith or political affiliation as a condition of receiving supports or services.
- Fundraising events or organizations, service clubs and foundations that act primarily to raise funds for their own or other organizations.
- Cost for major capital equipment or expenses related to construction, development of facilities or purchase of furniture.
- Deficit funding or tax payments.

Community Investment Criteria

The following community investment criteria and performance indicators are used by the Community Investment Committee to evaluate agencies and their proposed strategies and to develop community investment recommendations.

The basic framework within which United Way operates places responsibility on each funded agency for its own effective and efficient operation. It is the responsibility of the agency to demonstrate this by providing the Community Investment Committee with information relevant to the investment criteria.

It is the responsibility of the Community Investment Committee to evaluate each agency's performance in relation to these criteria based on the information provided by the agency. If opportunities for improvements in the agency's operations are identified during the review, UWLG can assist agencies to improve their management capabilities. Provision of assistance to agencies,

where needed, enhances UWLG’s ability to fulfil its accountability mandate for the responsible use of donor dollars.

Criteria	Indicators
<p>Community Need</p> <p>UWLG participates in community information tables, uses community consultation and local data to determine high-priority strategies to address root causes in Leeds & Grenville.</p>	<ul style="list-style-type: none"> • The proposal aligns with one or more of UWLG’s strategic focus areas and provides rationale for how the program links to identified goals • The proposal identifies the demographic profile of target populations that will be served. • The proposal builds on existing capacity, assets and structures within the community. • In addition to UWLG funding, the proposal demonstrates revenue from diverse sources to produce expected results. • Services offered elsewhere, by other organizations or government, are not being duplicated or evidence is provided that this strategy is more efficient, more effective or serving a part of the community that does not have access to the existing strategy. • The proposal is appropriate and aligns with United Way mission, vision, values, practices and Strategic Areas of focus.
<p>Program Deliverables and Outcomes</p> <p>This criterion is related to the program's ability to meet the deliverables and outcomes identified in the proposal. A work plan identifying outcomes, targets and activities will be included in the Funding Agreement and progress will be reviewed on an semi- annual basis.</p>	<ul style="list-style-type: none"> • There is research to support the effectiveness of the design and delivery of the program. • Activities outlined in the work plan advance the overall goals of the program. • Goals are realistic and achievable within the grant period. • The targets identified in the proposal are realistic and reasonable. • The proposal demonstrates collaborative activities in which multiple organizations work to achieve community outcomes through shared resources. • There are mechanisms to ensure active participation by all members of the collaborative. • Prevention and underlying causes are addressed, where appropriate.
<p>Organizational Capacity and Competence</p>	<ul style="list-style-type: none"> • The proposal aligns with the agency's mission.

<p>The skills, knowledge and assets that an agency has developed over time are used to evaluate the capacity and competence that the agency has to deliver the proposed program.</p>	<ul style="list-style-type: none"> • The agency demonstrates a practical need for UWLG funds. • The agency has effective management practices which is maintained throughout the investment cycle. • The agency's physical resources are appropriate to meet the needs outlined in the proposal. • The agency has demonstrated its capacity by successfully delivering similar or complementary services. • The agency utilizes resources efficiently, including staff, volunteers, physical and financial resources. • There is sufficient staff and volunteers with the skills and experience to do what the organization says it will do. • The agency's administrative costs are appropriate in relation to program activities. • The financial resources required to implement the program are reasonable. • The expenses and income outlined in the budget are appropriate and reasonable.
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COLLABORATION AND PARTNERSHIPS

UWLG is committed to building on existing assets in the community to maximize impact. Preference will be given to proposals that work toward this goal through collaboration and partnerships between agencies. The following outlines the meaning of Collaboration for UWLG Investment.

Collaboration is commonly interchanged with terms such as “networking,” and “cooperation” so there is sometimes confusion around the true meaning of collaboration.

- Networking is exchanging information for mutual benefit.
- Cooperation is a shorter term, informal relationship for sharing information only. Goals, resources and structures are individualized

Collaboration is a mutually beneficial and well-defined relationship entered into by two or more organizations to achieve results they are more likely to achieve together than alone.

It is focused on creating interdependence among organizations changing the way organizations work together.

Collaboration results in systems change. It implies a more durable and pervasive relationship. There is a common mission to achieve something greater than a single project or task. Collaboration is a mutually beneficial and well-defined relationship of two or more organizations which enables the development or enhancement of a service or product that cannot be created alone. Collaboration

brings together knowledge and experience to improve the process and outcomes of complex system.

FUNDING AGREEMENT

A Funding Agreement is a contract between UWLG and a funded partner. In signing the Agreement, the agency commits to honouring UWLG’s Community Investment policies and procedures and the expectations of outcomes to be achieved by the agency or collaborative. The Agreement will include the following:

- amount of United Way funding;
- definition of funded partner obligations;
- definition of United Way obligations;
- annual objectives/ targets and work plan;
- budget;
- funding term and payment schedule;
- reporting expectations; and
- memorandum of understanding with collaborative partners, where applicable.

Failure to fulfill these conditions or a shortfall in United Way's annual campaign may result in the reduction, suspension or termination of funding.

Timeline

The 2020/2022 Community Investment process will take place in the January – April 2021. Investments will begin April 1, 2021. The following table outlines the timing of the Request for Proposal process.

Activity	Start Date	End Date
Request for Proposals – Expression of Interest	January 28, 2021	February 12, 2021
Review of Expressions of Interest	February 15, 2021	February 24, 2021
Request for Proposals - Full Application	February 25, 2021	March 18, 2021
Review of Full Applications	March 19, 2021	April 15, 2021
Execution of Funding Agreements	April 22, 2021	April 30, 2021
New Programs Begin	April 1, 2021	March 31. 2022

- Note: First payment for this cycle will begin monthly starting ~ May 15, 2021.