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## **Community Impact Fund: Revised Application Process**

### **Summary Changes:**

- United Way Waterloo Region Communities' (United Way WRC) Quarterly Community Impact Fund applications will continue, but will focus on ONE or TWO Issue Areas ONLY.
- Funding Commitment is ONE year

### **Rationale for Changes**

#### *Community Investment Process 2020 to Q4 2024/25*

- This application model has been in place for 4 years. It was implemented to address pandemic/post-pandemic realities that had an impact on fundraising & the changing needs for community that called for greater funding allocations flexibility.
- Quarterly open calls were implemented, providing an opportunity for applications from new organizations; or those who had not previously applied to United Way WRC.
- Funding for (in most cases) 1 quarter at a time was implemented to ensure that resources available match allocations.
- Alignment in one of 9 Issue Areas, all addressing Poverty.

#### *This has created challenges for applicants and United Way WRC:*

- Planning yearly budgets on quarterly investments has been challenging for many organizations.
- Applying four times per year has required significant amounts of staff/volunteer time for both United Way WRC and applicant organizations.
- Large volume of applications every quarter – anywhere from 80 – 90 applications for review four times per year.



## Summary of Key Milestones in CIF Revision Process

A revised model was needed to address challenges noted above, while working within anticipated resources. To that end, the following process was undertaken:

1. *Spring 2024 DRAFT Community Investment Process Revisions* as a conversation starter, based on feedback to date from community partners.
2. *Spring/Summer 2024* – An initial series of 1:1 conversations with current funded organizations and other key stakeholders, including other funders.

Priority for these discussions was getting feedback from:

- Grassroots organizations, especially those serving/led by equity deserving communities;
  - Organizations that have most frequently aligned with Issue Areas targeted for funding in Q3 and Q4 of 2025/26 under the initial DRAFT proposal including: Food Insecurity; Children & Youth; Mental Health & Addictions.
3. *Late Summer 2024* – Further edits to the proposal based on feedback to date.
  4. *September 2024* – Funded Organization Meeting – DRAFT proposal presented for review and comment (online & in person meeting options).
  5. *October & November 2024* – Small number of follow up meetings with funded organizations, and further edits to proposal based on all feedback to date.
  6. *December 2024* – Final publication of this document.



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## **Community Impact Fund: Revised Application Process**

### **Community Impact Fund Process Changes**

#### **Number of application submissions:**

- Maximum of one funded application per year per applicant.
- Maximum one application submission per quarter

#### **Funding Amounts for ONE year:**

- Minimum request of \$20,000
- Maximum request of \$160,000<sup>1</sup>

Please Note: While the amount of funding for each quarter is intended to be equivalent or similar, nothing shall require or obligate United Way WRC to distribute funds to fund recipients if sufficient funds are not available to United Way WRC due to unexpected shortfalls in donations to United Way WRC, collection and/or campaign losses or unfulfilled requirements of recipients<sup>2</sup>.

*General Operating Support; and Program Project streams will still be available in each of the quarterly application calls.*

### **Collaborative Applications**

Pre-pandemic, United Way WRC received applications from collaborative tables/joint applications from multiple organizations. Often these were focussed on a specific demographic (e.g. People with Disabilities) or a particular service modality (e.g. Counselling services). The organizations involved would jointly submit one funding amount request, alongside a plan for how funding would be divided amongst the collaborating organizations.

Collaborative Applications provide a method for streamlining the application process and providing more say to service providers to identify areas of need. United Way WRC welcomes collaborative application submissions in any of the four quarters of fiscal year 2025/2026, with the following requirements:

#### *Application submission limitations:*

- Organizations that apply via a joint submission in a specific quarter, may not also submit their own application, or another application as part of a different collaborative submission

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<sup>1</sup> Maximum funding request may be higher for Collaborative Applications. Please speak with United Way WRC staff \*before\* submitting a Collaborative Application.

<sup>2</sup> Taken from United WRC's Funding Agreement terms, p. 3, 2<sup>nd</sup> paragraph.



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## **Community Impact Fund: Revised Application Process**

- Organizations that successfully receive funding for a collaborative submission in one quarter may not apply again during the same fiscal year.
- As part of the Collaborative Application,.
- Additional details will be included as part of the Orientation session(s) offered January 2025.

Organizations interested in submitting a collaborative application MUST contact United Way WRC staff prior to the application submission deadline.

### **Issue Area Changes/Removal:**

- Two Issue Areas have been removed from the quarterly application process: *Innovation & Systems Change; and Leadership, Volunteerism & Capacity Building.*
- Investment in these related activities will still be considered, however applicants will need to apply within one of the remaining Issue Areas in the appropriate quarter.

### **Report Timing Changes:**

*Under the Previous Application Model:*

**There will be one more annual report under the prior model that will go live in Spring 2025.**

Under the previous CIF model, funded organizations would report once per year in the Spring. This timing was applicable to anyone who received funds in the previous fiscal year.

**For those organizations that were funded in any/all quarters of fiscal year April 1<sup>st</sup> 2024 to March 31<sup>st</sup> 2025, a report form will be open on or about April 1<sup>st</sup> 2025 and be due by April 18<sup>th</sup> 2025.**

*Under the Revised Application Model:*

Your reporting deadline will correspond to the quarter in which you applied and received funding – 1 year later. E.g. Apply under Affordable Housing & Homelessness in February 2025, for funding for Q1 April – June 2025. Your report would go live & be due in April, 2026.



## Issue Area Focus by Quarter

Changes take effect fiscal year 2025/26 - first application going live in Feb 2025 for Q1

*FINAL Order of Issue Area(s) focus is presented below. Applications will ONLY be accepted for the specific Issue Area(s) listed in each quarter.*

### Q1 Apr – Jun 2025

- Affordable Housing & Homelessness
  - Applications (open/close): February 3<sup>rd</sup> – 21<sup>st</sup> 2025
  - Outcomes Communicated: March 24<sup>th</sup> – March 28<sup>th</sup> 2025
  - Payment (if successful): Early April 2025
  - Reporting on Q1 (open/close): April 2026

### Q2 Jul – Sept 2025

- Children & Youth
- Hate, Gender-Based and Family Violence
  - Applications (open/close): April 14<sup>th</sup> – May 2<sup>nd</sup> 2025
  - Outcomes Communicated: June 2<sup>nd</sup> to 6<sup>th</sup> 2025
  - Payment (if successful): Early July 2025
  - Reporting for Q2 (open/close): July 2026

### Q3 Oct – Dec 2025

- Community & Social Supports
- \*\*Literacy, Employment Skills & Assistive Device <sup>3</sup>
  - Applications (open/close): July 14<sup>th</sup> – August 1<sup>st</sup> 2025
  - Outcomes Communicated: September 1<sup>st</sup> to 5<sup>th</sup> 2025
  - Payment (if successful): Early October 2025
  - Reporting for Q3 (open/close): October 2026

### Q4 Jan – Mar 2026

- Mental Health & Addictions
- \*\*Food Insecurity <sup>4</sup>
  - Applications (open/close): October 14<sup>th</sup> – 31<sup>st</sup> 2025
  - Outcomes Communicated: December 1<sup>st</sup> – 5<sup>th</sup> 2025
  - Payment (if successful): Early January 2026
  - Reporting for Q4 (open/close): January 2027

## Important: Bridge Funding -

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<sup>3</sup> Change in order from Sept 2024 draft Community Investment Process – from Q4

<sup>4</sup> Change in order from Sept 2024 draft Community Investment Process – from Q3



- It is recognized that while this process will provide a longer term, deeper funding commitment for some organizations, that those applicants applying in Q3 or Q4 may experience additional challenges in transitioning to this revised model
- “Bridge Funding” was identified through conversations as a potential option to partially support organizations looking to apply in Q3 or Q4 ONLY.
- **“Bridge Funding” will NOT be available until Q2 2025/26 at the earliest, with a focus on organizations planning to apply exclusively in Q3 or Q4.**
- Availability of “Bridge Funding” is strictly to be determined; is dependent on availability of resources through ongoing United Way WRC fundraising efforts; *and may be withdrawn at any time.*

## Orientation Sessions for Applications

An orientation to the revised Community Impact Fund process, with a specific emphasis on completing application forms (General Operation Support; and Program/Project Streams), will be hosted on the following days:

1. *Remote Option* - Tuesday January 21<sup>st</sup> 2025, 1:00 pm – 2:30 pm

Location: Microsoft Teams [Need help?](#)

- [Join the meeting now](#)
- Meeting ID: 212 884 108 077
- Passcode: j4jB72ND

2. *In Person Option* -Wednesday January 22<sup>nd</sup>, 2025, 10 am – 11: 30 am.

Location: Board Room, United Way Waterloo Region Communities, 50 Sports World Crossing Rd, Kitchener

- The content for both sessions will be the same.
- This Orientation is intended for those who will be completing and submitting application forms.