



UNITED
WAY OF
SOUTHERN
ILLINOIS

FUNDING APPLICATION GUIDELINES

INTRODUCTION

The United Way approach to financing human service programs is based on the belief that the interests of the people of southern Illinois are best served when a unified process is used to make decisions about funding to the agencies which provide services. United Way grants are used to support the maintenance of the agencies and to provide funding for specific, identified service programs from the agencies. Strict accountability is expected and required of all funded agencies.

As a custodian of community contributions, United Way must assure that services meet changing needs and accepted standards and reflect effective and efficient use of funds. Central to this mission is the working relationship between United Way and its partner agencies.

The Allocations Committee is the point at which community financial resources and the needs of the people meet. Sometimes difficult decisions have to be made in light of overall community priorities and available funding potential.

In southern Illinois, as in most places, the United Way dollar represents only a part of the total annual expenditures for local health, family and child care, youth and character building services. As such, it is important that United Way dollars are used to buy effective, meaningful, unduplicated services from the member agencies at the lowest cost to the giving public.

When an agency becomes a partner of the United Way of Southern Illinois (UWSI), the budget assumes added importance.

- It is the medium through which the agency's service is interpreted to this financing body.
- It forms the basis for the annual grant and payment of funds and the accounting for their use.
- It is the device through which the United Way can assure the contributors that their money is being used efficiently.
- It is the instrument through which community planning may be made effective: expansion in services, reorganization of programs, and consolidation and re-definition of function.

The Allocations Committee is given the responsibility of reviewing funding applications and determining whether those applications, presented yearly by participating agencies, show an accurate analysis of program services and dollars required for such operations. Members of this committee are volunteers -- persons who give their time and thought to study agency and community needs in relation to available funds.

Through objective study and judgment, this committee represents the citizen-givers in determining how contributed funds can best be granted for the most effective well-balanced community services.

GRANT DURATION

Grants are awarded annually. UWSI will disburse each agency's total allocation in four equal payments in March, June, September, and December.

However, UWSI will examine the campaign collections and adjust the 3rd and 4th quarter allocations appropriately.

FISCAL MANAGEMENT ORGANIZATION

For granting purposes, one organization must apply for funding as the “Fiscal agent” on behalf of the program(s). This organization will hold the contract with United Way and take the responsibility for managing the funds on behalf of the program(s), distributing funds as agreed to by the budget and maintaining records suitable for auditing. The Fiscal agent will also be responsible for submitting all the required reports and documents on behalf of the program(s) to UWSI.

PURPOSE

United Way of Southern Illinois seeks to create long-lasting community change by addressing the underlying causes of the most significant issues facing southern Illinois residents. We work to advance the common good by focusing on three impact areas:

EDUCATION: Helping children and youth achieve their potential through education. Improving access to quality, affordable child care & early learning opportunities. Partnering with schools & parents to improve graduation rates. Providing afterschool programs for at risk youth.

HEALTH: Improving people’s health and safety. Increasing access to healthcare services. Reducing domestic violence. Increasing health education & preventative care, including nutritional meals.

INCOME: Helping families become financially stable and independent. Supporting basic needs while increasing financial education. Helping people, including those with disabilities, develop skills needed to maintain employment. Assisting at-risk & senior residents with understanding and obtaining core support services to remain independent.

TIMELINES

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| • March | Distribution of Allocations Applications |
| • April _____ | Applications due by 5:00 PM |
| • May | Volunteers receive funding applications |
| • May | Allocations Committees review and meet |
| • July | Allocations Committees make recommendations to the UWSI Board of Directors |
| • July | Applicants notified of final Award funding decisions |
| • Calendar year | Annual contract period |

ELIGIBILITY

“FUNDED AGENCY” MEMBERSHIP POLICY

United Way of Southern Illinois (UWSI) offers the potential for becoming a Funded Agency to not-for-profit human service organizations with clients in any of the 14 counties it serves. An applicant organization must meet the following standards in order to be considered for Funded Agency status and for funding of one or more of its programs:

- Its objectives, purpose, services and programs must meet an established and well-recognized need of the community. Preference will normally be given to organizations with programs that serve one or more of the three broad areas of need identified in the United Way Community Impact Agenda: Education, Health & Income.
- It can provide documentation of its 501(c)(3) tax-exempt status from the Internal Revenue Service and its registration as a charitable organization with the Office of the Illinois Attorney General. A first-time applicant may be approved as a Funded Agency if (1) the applicant has applied for 501(c)(3) tax-exempt status and registration with the Illinois Attorney General, and (2) the agency has been incorporated for more than one year. Tax-exempt inter-governmental agencies are eligible as long as the funds allocated to them within any particular UWSI Advisory Board zone do not constitute more than 15% of the total funding allocated in that zone.
- It documents its fiscal integrity by providing UWSI with complete financial information, including a certified audit (when applicable), IRS 990 and AG 990 - IL.
- It is governed by a rotating Board of Directors.
- It has an affirmative action process that complies with local, state and federal laws and executive orders, including a statement of non-discrimination based on race, color, religion, ethnic origin, disability, gender, sexual orientation, and age.
- Each program for which it seeks funding does not detrimentally overlap nor conflict with a program of any other Funded Agency in the UWSI Advisory Board zone(s) in which funding is sought.

An applicant organization is not eligible to become a United Way Funded Agency if:

- It is primarily political in nature. Funded Agencies are encouraged to serve as advocates for policies and practices that improve the lives of their clients, but United Way does not grant membership status or funding to organizations that have a primary focus on lobbying.
- It provides services limited to the members of a single religious, racial or ethnic group.
- Its sole purpose is to present cultural or artistic events. This restriction does not apply to historical societies, fine arts organizations, and similar groups which offer educational and training programs that complement the United Way's Community Impact Agenda.

FUNDING REQUIREMENTS

Requirements of the funding agreement with United Way of Southern Illinois are outlined in the Agency Agreement. By signing the Agreement, you acknowledge that you have read the funding requirements and that your proposal is submitted with full commitment.

United Way of Southern Illinois will fund programs offered by Funded Agencies based on the results they have achieved and their potential for future contributions to improving people's lives. Among the primary factors that will be taken into consideration in regard to each program are the following:

- The type(s) of service it provides.
- The amount of each type of service it provides.
- The extent to which its services address the broad areas of need identified in United Way's Community Impact Agenda.
- The extent to which the organization documents a compelling need for United Way's financial support of the program.
- Its success in meeting established goals.
- The cost effectiveness of its operations.
- Its ability to consistently operate within its projected budget.
- Its success in raising funds through program fees, government funds, foundation funding and independent fund raising.
- Its multi-year budget projections.
- The degree to which the organization's Board of Directors is actively involved with the program.
- Its demonstrated willingness to support United Way through participation in annual campaign activities.
- Its coordination with programs offered by other agencies.
- Its use of volunteers in service delivery.

PROPOSAL REVIEW PROCESS

Based upon the preceding criteria – and any others that it shall deem appropriate and communicate to subsequent reviewers – each UWSI Advisory Board's Allocations Committee recommends Funded Agency status and funding allocations to the UWSI Board of Directors. The recommendation in regard to each organization (and, if applicable, each separate program from which the organization sought funding) shall include the following:

- A decision as to whether or not the organization should be accepted as a Funded Agency of UWSI.
- A statement as to the recommended amount of funding, if any (and not to exceed the amount requested), for each separate program on behalf of which the organization applied.
- A statement of any additional criteria, beyond those listed in the section above, that were used in reaching the decisions about Funded Agency status and program funding.
- A clear and concise narrative about each program's application and the Allocations Committee's responses and decisions in regard to it.

CAMPAIGN DESIGNATIONS POLICY

The United Way does not support organized "popularity" efforts promoting designations to any given agency or charity. However, the United Way does respect the right of the donor to exercise his/her free choice in accordance with the terms of this policy. United Way will honor designations to current partner agencies to the extent of the total of the designation or the approved level of funding, whichever is **greater**. Designations to other United Ways shall be honored. All designations are subject to reciprocal adjustment of the uncollectible factor and administrative charges. Organized designation campaigns by United Way funded agencies will be considered contrary to the basic purpose of the United Way and will be viewed accordingly by the Allocations Committee.

ADDITIONAL INFORMATION

For additional information about this funding opportunity, you are encouraged to contact our office at:

(618)997-7744 or via email: uwsihelps.org

SUBMISSION INFORMATION

Proposals must follow the timeline and format and are due at the United Way offices on **April** _____

Submit **as directed on the application** to the address below:

ATTN: Allocations Funding Committee
United Way of Southern Illinois, Inc.
P O Box 1901
Marion, IL 62959

Drop off to: 1800 W. Boulevard, Marion, IL 62959

Proposals that arrive at United Way after the due date and time will not be considered. If you are using US mail, be sure to mail early. A postmark will NOT be considered on-time receipt at the United Way office.