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**San Marcos, TX 78667 Email: unitedway@uwhays.org**

**www.unitedwayhaysco.org Email: michelle.harper@uwhays.org**

Dear Agency:

Congratulations! You are invited to submit an application to United Way of Hays County for 2021 Community Investment Allocation funding. The following is information on how to prepare and submit your application, as well as forms for you to complete.

With the increased need for services by all agencies, we are being increasingly strategic in our community investments and the impact they have on our community and its residents. In the application, we are asking you to provide detail on the outcome and impact of the program for which you are seeking funding. We must measure results of the invested dollars and provide optimum value of service delivery to our community. In general, we are asking for less information about your agency, but more about the specific project/program for which you are seeking funding.

**If you are applying for more than one project or program, you must fill out the Application Form (section A-E) and the program budget worksheet for each program for which you are seeking funding.**

**Resources Available:**

We realize that our request for you to measure the impact of your programs may present challenges to you. We understand that you are a small agency with limited resources and are not asking you for professional program evaluations. However, we ask you to be as specific as you can on the outcome of the program for which you seek funding. We can provide advice on developing outcome measures and indicators.

**Process and Timeline:**

* **This application and all required documentation are due as uploads to our website by 5pm, Friday, July15, 2022. See following instructions for more detail.**
* The applications will be reviewed and you **may** be contacted to schedule a presentation in front of our Funds Distribution Committee.
* The Funds Distribution Committee reviews the requests for funding, hears the presentations, seeks additional information, and makes recommendations to the United Way Board of Directors.
* The Board of Directors will meet in July to consider the recommendations of the Committee and to make funding decisions.
* Agencies will be notified of the allocation decisions by end of July.

Please note that neither past support from United Way, nor this invitation to apply, is a guarantee that you will receive a Community Investment Allocation in 2023.

If you have questions, please feel free to contact me by email. Thank you again for your interest in being a United Way funded partner and for all you do to make our community a better place.

Michelle Harper

President/CEO

**United Way of Hays & Caldwell Counties**

**2023-2024 APPLICATION INSTRUCTIONS**

Thank you for your interest in applying for funding from United Way of Hays and Caldwell Counties. Please follow the instructions carefully. Our volunteers need clear, concise and complete information to enable them to review your request.

United Way staff is available to answer technical questions about the application. For more information, call: 512.667.4525 or email: michelle.harper@uwhays.org.

1. Applications must be **received** by Friday, July15, 2022, 5pm.
2. **REQUIREMENTS FOR APPLICATION PACKET: You should download the needed forms for the application from our website prior to beginning your application process. Please then fill out and gather all of your documents prior to starting the webform. You will not be able to pause and come back to your application. Uploaded files must be either .doc .docx .xls or .pdf with PDF being preferred.**
3. Application form sections A-E (should be no more than 8 pages total)
	1. Please be clear, concise and complete and answer questions in the order given.
	2. **If you are applying for more than one program, Application form A-E must be filled out for EACH program for which you are applying**
4. Proposed program/project budget using the **Total Program Budget Worksheet**
5. Financial statements (balance sheet and profit/loss statements) for the agency’s last full fiscal year – will need to be in 1 document.
6. Organizational budgets for current fiscal year
7. Complete copy of latest IRS form 990
8. Copy of audit or CPA review. (should match year of latest 990)
9. Two current human-interest stories that can be used for publicity *(must be 1 document)*.
10. Anti-Terrorism Compliance statement. / Non-Discrimination Policy Statement
11. Roster containing the contact information of current Board of Directors.
12. Agency agreements will be sent to applicants who are approved for funding for their signature.

 **EVALUATION CRITERIA**

Funds Distribution Committee members will use the following criteria for reviewing proposals.

**40% COMMUNITY NEED** Does the program address a recognized health and human service need in our community? Is the need consistent with UWHC mission and Funding Priorities? How serious is the problem?

**30% IMPACT** How well does the program demonstrate a meaningful linkage between community needs, program activities and outcomes? Will the program provide a meaningful volume of services and/or people served? Will United Way funding make a difference?

**20% ABILITY AND EVALUATION** Does the agency have a history of reliability? Are there adequate staff and resources to conduct this program? Does the program plan seem sound? Are clear goals and objectives written? Are measurable outcomes evident? How well does the agency/program demonstrate the ability to deliver and measure proposed outcomes?

**10% FINANCIAL MANAGEMENT** Is the financial information presented clearly & accurately? Does the agency have a balanced budget? Does the agency have adequate reserves? Is there diversified funding? Is other funding available? Will funds requested from UWHC support direct client services? Are overhead expenses a reasonable % of total?

**TRACK RECORD** (For 2013 Funded Partners only) **Grade: A, B, C, D, E, F** Is there year round commitment to work in partnership with the United Way? Did the agency accomplish its goals and objectives last year? Did the agency make a difference with last year’s United Way funds?