



## 2023-2026 Impact Funding Guidelines

United Way Perth-Huron (UWPH) strives to create real, lasting change to improve the quality of life in our communities. United Way identifies, understands and addresses the root causes of social issues; brings together research, experts and resources; initiates and invests in effective programs and services; and builds capacity in the non-profit sector.

We believe the root of all action for change is the ability to see and feel ourselves in the situations of others. We believe all people and all communities have the potential to overcome challenges. We treat people with dignity, fairness and equality. We make decisions based on the needs and expectations of our community and we believe it is imperative to measure and communicate our impact.

As part of United Way Perth-Huron's (UWPH) Community Impact & Allocations Plan, UWPH gives everyone in our community an equal opportunity to submit funding requests. Funding requests will be evaluated using the following criteria:

1. Program provides service in Perth County and/or Huron County (Ontario, Canada)
2. Program reduces or prevents poverty in our community
3. Program prioritizes service to one or more equity-seeking and vulnerable populations
4. Program aligns to UWPH's Community Impact & Investment Plan
5. Program addresses an urgent need facing our community
6. Program is led by an eligible organization that:
  - o is sustainable, stable and strong
  - o fulfills the expectations for Supported Partners (as detailed in the [Investment for Impact Policy - All13](#))

### Impact Funding Description

Three-year Impact Funding is intended for ongoing programs that are part of the organization's over-arching structure and mission. The intent of offering multi-year funding is to provide increased financial stability for applicants and a greater capacity to measure outcomes achieved. The multi-year funding model promotes sustainability of services for the community by allowing organizations to concentrate more on program design, delivery and evaluation. Additionally, multi-year funding encourages longer-term planning, evaluation of impact and efficiency for both organizations and UWPH. It may also enable organizations to better leverage their positions for additional funding elsewhere. Multi-year funding facilitates efficient and effective use of staff/volunteer/organization time during the allocation process and enables both organizations and UWPH to engage in longer-term planning and outcomes measurement.

### Impact Funding Details

- Impact funding applications will be only considered every three years.
- This application is for funding starting April 1, 2023. Funding years for this application cycle are:
  - o Year 1 - April 1, 2023 to March 31, 2024

- Year 2 - April 1, 2024 to March 31, 2025
- Year 3 - April 1, 2025 to March 31, 2026
- Agencies may apply for multiple programs in this funding stream. However, separate applications must be submitted to UWPH for each proposed program.

The Impact Funding application is in two parts:

1. Expression of Interest (EOI)
  - Used to assess whether your project/program is eligible for UWPH funding.
  - Deadline to submit EOI: April 15, 2022 at midnight.
  - Applicants will be notified by April 26, 2022 regarding whether the EOI was approved or declined or if further clarification is required.
2. Full Application
  - Access to the full Impact Funding application will be provided if the EOI is approved.

### Starting an EOI for Impact Funding

If your organization/group has applied for UWPH funding before:

- Login to your organizations' account via [Foundant](#)
- Click on 'Apply'
- Create and submit your EOI by

If your organization/group has not applied for UWPH funding before, please contact Megan Partridge at 519-271-7730 x 225 or [mpartridge@perthhuron.unitedway.ca](mailto:mpartridge@perthhuron.unitedway.ca) prior to starting your EOI.

### Please thoroughly review additional details below regarding:

- Funding criteria (sections 1.1-1.4 below)
- Exclusions for funding (sections 2.1-2.3 below)
- Application review process (sections 3.1-3.3)

### Application Support

UWPH is committed to supporting applicants throughout the application process. For help with the application process, please contact Megan Partridge (Director Governance & Community Impact) at [mpartridge@perthhuron.unitedway.ca](mailto:mpartridge@perthhuron.unitedway.ca) or 519-271-7730 x 225



# 2023-2026 Impact Funding Guidelines

## 1. Funding Criteria

### 1.1. Prioritizing Poverty Mitigation

UWPH's funding model prioritizes poverty reduction and prevention as a way to focus our work and impact in the community. UWPH defines the state of poverty as one in which income is too low to provide for an adequate standard of living. Poverty is about more than income and is also about exclusion from resources, opportunities, and connections.

UWPH will invest in poverty reduction and/or prevention initiatives that:

- serve people who are living in poverty and/or;
- serve people at risk of living in poverty and/or;
- lessen the effects of poverty and/or;
- prevent poverty and/or;
- reduce the incidence of poverty in our community and/or;
- address the root cause(s) of poverty.

Agencies must present evidence and/or descriptive information to identify how the proposed program reduces or prevents poverty in at least one of the following ways:

- The program prioritizes service to a specific group of people who are experiencing poverty or are at risk of experiencing a higher incidence of poverty than the general population;
- The program lessens the effects of poverty;
- The program prevents poverty;
- The program helps people break the cycle of generational poverty;
- The program helps people move out of poverty; and/or
- The program creates systems change that reduces the incidence of poverty in our community.

### 1.2. Prioritizing Equity-Seeking Groups & Vulnerable Populations

UWPH is also focussed on increasing funding opportunities to organizations and programs that serve equity-seeking groups and/or vulnerable populations who are disproportionately affected by social challenges in our region.

Poverty and other social challenges impact everyone, but some groups and communities are disproportionately impacted because of deeply embedded social and structural inequities. The ongoing legacy of systemic discrimination and racism continue to influence our current system of laws, our institutions, and our culture. As a result, many people in our communities are denied opportunities to reach their full potential. These populations are considered to be equity seeking.

UWPH prioritizes investments into the following equity-seeking groups and vulnerable populations (in no specific order):

- People with low income or living in poverty including children and youth

- Indigenous peoples
- Racialized communities
- People experiencing homelessness
- Immigrants and refugees
- People who live in rural or remote communities
- Women and girls
- People experiencing intimate partner or gender-based violence
- People living with mental illness and/or addiction
- Persons with disabilities
- People who identify as 2SLGBTQ+ or non-binary

### 1.3. Aligning to UWPH's Community Impact Areas

UWPH focuses on three impact areas through a poverty and equity lens:

1. From poverty to possibility  
Meeting basic human needs and supporting people in moving out of poverty
2. All that kids can be  
Helping children and youth reach their full potential
3. A strong community with resilient & healthy people  
Supporting personal well-being and strengthening communities

In addition to meeting poverty reduction and/or prevention requirements, the program must align with one of these three impact areas. A program may have several objectives and may fit under more than one of the impact areas. Agencies must select one impact area by considering the following:

- Choose the area that most clearly aligns with the primary focus of the program
- Choose the area for which the agency has the best ability to measure and report on. Successful applicants will be required to report outputs and outcomes for the impact area selected.

### 1.4. Eligible Organizations

At present, UWPH is limited by the Income Tax Act to only fund registered charities and qualified donees as defined by the [Canada Revenue Agency](#). However, if an applicant does not meet this criterion, they could receive funding from UWPH if they either:

- a. **Enter into a formal agreement with an organization that meets this criteria and other eligibility requirements;**

A registered charity or other qualified donee can act as a sponsor organization for a nonprofit organization that does not have charitable status and is not a qualified donee as defined by Canada Revenue Agency. In this case, the sponsor organization would enter into the funding agreement with UWPH and assume financial and legal responsibility for the funded program, including reporting requirements and agency expectations. Funding would be issued to the sponsor organization.

- b. **Enter into an Agent Agreement with UWPH for non-qualified donees**

For any group looking to pursue this option, please directly contact Megan Partridge (Director Governance & Community Impact) for more information.

To receive UWPH funding, organizations must also:

- have an active Board of Directors
- have annual financial statements
- fulfill UWPH reporting and outcome measurement requirements
- comply with all applicable federal, provincial and municipal laws and does not infringe upon any right under the Ontario Human Rights Code

## 2. Exclusions for Funding

### 2.1. Organizations

UWPH will not fund the following (ineligible organizations):

- For-profit organizations
- Funding bodies that reallocate UWPH funding to another organization
- Foundations
- Unions
- Professional Associations
- Government or government agencies, boards and/or commissions
- Regulated health professionals (see listing at [http://www.health.gov.on.ca/en/pro/programs/hhrsd/about/regulated\\_professionals.aspx](http://www.health.gov.on.ca/en/pro/programs/hhrsd/about/regulated_professionals.aspx))
- Hospitals and long-term-care facilities
- Universities, colleges and school boards
- Organizations whose purpose is solely related to political activity, as defined by the Canada Revenue Agency
- Organizations without a clear demarcation between religious and community service
- Organizations that could be deemed discriminatory, as defined by the Ontario Human Rights Code

An ineligible organization (per the list above) can apply for UWPH funding provided that:

- it is applying as a sponsoring agency for a collaborative project;
- it is recognized by CRA as a Qualified Donee; and,
- the funding requested is specifically for program expenses.

### 2.2. Programs/Services

The following types of programs/services are not eligible for funding from UWPH:

- Duplicate program(s)/service(s) in the same geographical area
- Loans or grant programs
- Government mandated programs/services (ex. services covered by OHIP, Child and Family Services Act, etc.)
- Licensed childcare programs
- Primarily cultural programs: *Many educational, recreational, and social programs include cultural events. This is not only acceptable, but also desirable. Programs excluded from UWPH allocations are those that are primarily cultural such as theatre, music, museum, or art programs.*
- Religious programs: *The exception is that funding of programs sponsored by religiously affiliated organizations may be considered provided that a written*

*guarantee accompanies UWPH allocation request stating that the organization's programming is open, unbiased and accessible to all members of the community and that no religious education, no proselytizing, and no attempt at moral suasion will be undertaken as part of the program.*

- Medical research or procedures
- Some categories of health services: *In general, UWPH will only fund health programs that help maintain the ability of individuals to live independently and with dignity in the community, or programs that are aimed at improving overall community health. Such programs may involve educational, rehabilitation, or preventive programs that are not funded by the Canada Health Act. Programs dealing with acute medical problems are usually not funded.*
- Exclusionary programs: *UWPH will not fund programs that exclude individuals because of race, ethnic origin, religion, or sexual orientation. Programs specifically aimed at helping groups belonging to a specific race, ethnic origin, religion, or having a specific sexual orientation, will not be automatically excluded. Broadly based programs that are legitimately restrictive such as programs for seniors, youth, poverty, refugees, men's aggression control, and survivors of woman abuse are not excluded from funding.*

### 2.3. Costs

The following costs are not eligible for UWPH funding:

- Capital expenses
- Alcohol or drugs
- Gifts
- International travel
- Fraudulent activities

Exceptions to organization, program or cost eligibility criteria may be granted at the discretion of the Community Impact & Allocations Committee and approval by the Board.

## 3. Application Review Process

### 3.1. Prioritizing Requests

During the evaluation process for funding requests, a team of Community Impact & Allocations Committee (CIAC) volunteers complete thorough and comprehensive reviews of all applicants requesting funding from UWPH. The process involves many hours of both independent and collective review of applications as well as discussions and analysis of applications requesting support from UWPH. In the end, the thoughtful funding decisions ensure UWPH supports organizations that are accountable, transparent and both fiscally and socially responsible.

Even though an applicant might meet or exceed expectations on every criterion, UWPH is not always in the position to meet all recognized needs. Once an organization is approved for and accepts funding from UWPH, it is subject to all UWPH policies and allocations procedures and must abide by the UWPH Supported Partner Agreement.

At various points throughout the process, applicants may be asked to provide additional information regarding the program, which is being applied for funding.

### 3.2. Timeline

Expression of Interest (EOI)	Opens	March 18, 2022
	Closes	April 15, 2022
	Notification of approval/denial	April 26, 2022

Full Application (for approved EOI's only)	Opens	May 2, 2022
	Closes	May 31, 2022
	Notification of denial/ <u>conditional</u> approval	Sept. 1, 2022
	UWPH Fundraising	Sept. 2022 – March 2023
	Formal Funding Notification	Mid-March 2023

### 3.3. Annual Reporting for Successful Funding Applicants (Supported Partners)

Impact measurement continues to be a priority for United Way Perth-Huron. UWPH and its Supported Partners measure the outcomes of programs/projects to:

- continuously improve – rethink, change, and adjust strategies, actions and investments
- provide evidence that change is occurring
- demonstrate and communicate the impacts of changes on individuals and communities

At minimum, there will be annual reporting for all investments by UWPH. Normally Supported Partners are required to report at the end of each funding year on the progress of their program/project, the outcomes achieved, testimonial stories for campaign use, and will submit a financial statement for the year using a specific format provided by UWPH.

Annual report data will be aggregated and used by UWPH for external communication, donor stewardship and community planning.