

LIVE UNITED



United Way of Abilene

United Way of Abilene

Letter of Intent for 2020 Community Investment Funds

Funding Cycle: January 2020 – December 2020

Deadline: June 24, 2019 – 3:00 p.m.

Letter of Intent Process Executive Summary

United Way of Abilene's mission is to promote the health, education, and financial stability of every person in the West Central Texas area. We do this by actively seeking to leverage the intellectual, organization, institutional, financial, faith-based, and personal resources of our communities as the best means to make positive, measurable, and lasting change for the families we serve.

United Way of Abilene funding sustains and strengthens a network of local programs and services prepared to address pressing needs in our area in the areas of education, financial stability, and health. We know community challenges are multifaceted, and we endorse the strength of collaboration.

United Way of Abilene is releasing a request for letters of intent (LOI) from interested 501(c)3 organizations with an applicable program that addresses community priorities in the areas of education, financial stability, and health. United Way of Abilene makes strategic investments in programs (not agencies) and submitted LOIs should outline proposals for specific programs. The LOI should demonstrate general organization viability, good financial standing, and alignment with United Way of Abilene's priority areas. An organization may propose multiple programs. A separate LOI is required for each proposed program. **United Way leadership will review LOIs and will invite qualifying organizations to submit a full proposal for 2020 investment. Invitation to submit a full proposal does not guarantee 2020 investment.**

I. Timeline, Deadline, and LOI Requirements

Letter of Intent Released	June 3, 2019
Letter of Intent Due	June 24, 2019
Notification of Letter of Intent Decision	July 2, 2019
Application for Community Investment Released	July 9, 2019
Application for Community Investment Due	September 5, 2019
Notification of 2020 Investment Decision	December 2019

Please ensure mail delivery or hand deliver 5 copies of the LOI Form and Required Documentation by June 24, 2019 at 3:00 p.m. to:

Hand Delivery: United Way of Abilene
Attn: Bethany Ashlock
240 Cypress Street Suite 200
Abilene, TX 79601

Mail: United Way of Abilene
Attn: Bethany Ashlock
PO Box 82
Abilene, TX 79604

You are responsible for submitting complete LOI packets by the deadline. Any LOI not received by the deadline will not be eligible for consideration.

II. Eligibility Requirements

The organization must demonstrate competency in four main areas as well as meet the minimum requirements outlined in this section.

1. Addressing community needs
2. Organization alignment with United Way of Abilene priority areas
3. Good financial standing
4. Sound governance by a Board of Directors

- **Organization Requirements**

At a minimum, **organizations** must certify or provide the following in order to apply for and receive funding from United Way of Abilene's Community Investment Review Process:

- Be recognized as an organization exempt from federal income tax under IRS Section 501c (3) of the Internal Revenue Code. *(Exceptions to this requirement may be granted for governmental programs at the discretion of the United Way of Abilene Board of Directors.)*

- Be involved in providing program(s) and services that are health, education, or human-service related and directly serve individuals in Taylor and/or surrounding counties.
- Have an independent governing body consisting of at least nine voting members and who shall meet at least four times per year.
- Maintain a non-discrimination policy or plan.
- Be financially stable and able to submit an annual certified audit as well as an IRS 990 tax form
- Comply with all federal and state laws

- **Program Requirements**

In addition to the organization meeting the above criteria, the program for which funding is sought shall meet the following criteria:

- Provide services in Taylor and/or surrounding counties
- Program shall have at least one other funding source outside of United Way
- Program shall align with United Way of Abilene’s focus areas
- Demonstrate relevant or innovative approaches to address community needs and measurable outcomes

III. Focus and Priority Areas

Education
Children are safe and secure and have responsible caring adults in their lives.
Students succeed in school.
Students graduate and are ready for higher education, military service, or work.
Children and youth have the tools they need to make good decisions and effectively deal with social challenges.
Income
Families have access to affordable childcare that presents opportunities for growth and development and prepares children for school.
Families learn to budget and save money for housing, utilities, transportation, and other expenses.
Families have access to emergency/transitional housing and basic needs services.
Individuals have access to information, services and support that allow them to overcome challenges to be more self-sufficient.
Community members, including the elderly, feel secure in their home and maintain quality of life.
Health
Families have access to adequate dental and medical services.
Families have access to nutritious meals or food supplies.
Families develop positive habits and have resources to help them cope with challenges.

IV. Funding Availability

United Way of Abilene supports programs that show measurable and meaningful program impact. Investment from United Way may be used for a variety of programmatic and/or operational purposes directly related to proposed activities but may not be used for the following: fundraising, capital campaigns, endowment efforts, deficit financing, academic research, support for public office candidates, or grants to individuals. Regardless of the specific use of investment, grantees will be accountable for agreed upon and proposed targets.

V. Program Measures

United Way of Abilene is accountable to the community and its donors to fund programs that deliver results and produce the maximum intended benefit in our community. As such, United Way of Abilene requires all applicants to identify clear and concise program measurements. These serve both to project and assess program impact.

When forming these measures organizations should consider three questions:

1. What service will your program provide?
2. How many people will benefit from your program?
3. How will you know people have benefitted from your program?

United Way of Abilene can work with funded programs to establish or develop mutually agreed upon performance indicators, if needed. United Way is committed to supporting the ongoing capacity building of funded partners in this area.

Application Process After LOI Approval

All LOIs received by the deadline will be reviewed by United Way of Abilene staff and volunteers. Approved LOIs will be invited to submit a full application for 2020 investment on or before July 2, 2019. Notification of LOI decision will be made via e-mail to the provided e-mail address. Applications for Community Investment will be released to you via e-mail on July 9, 2019. Information about the application process is provided below and more specific instructions will be included with the application.

Community Investment Application Process

United Way of Abilene's Community Investment application process includes a Program Application, Stewardship Review Application, Program Presentations, and Site Visits.

Program Application: The Program Application requests a narrative for the scope, emphasis, and outcomes of the applying agency and program. Your narrative should highlight community needs, relevant approaches to address those needs, and measurable outcomes.

Stewardship Review Application: The Stewardship Review Application requests financial statements, agency audits, Form 990s, and other organizational management information.

Site Visit: As part of the application and review process, United Way of Abilene will take review volunteers on a site visit of your program (if applicable). A specific date and time will be provided in advance of your site visit.

Program Presentation: As part of the application and review process, United Way of Abilene requires applying programs to make a 30-minute presentation to review volunteers. A specific date and time will be provided in advance of the program presentation day.

Community Investment Application Review & Approval Process

United Way of Abilene is accountable to the community and its donors that programs funded deliver results and produce the maximum intended benefit in our community. To ensure accountability and transparency, United Way of Abilene has established the following application review and decision-making process:

1. All submitted applications will be reviewed by a Community Impact Review Team (CIRT) and Stewardship Review Team of community volunteers with support from United Way of Abilene staff. CIRT and Stewardship Review Teams will review, assess, and score each application.
2. Informed by recommendations from CIRT and Stewardship Review Teams, United Way of Abilene's CIRT Chairs will make a recommendation to the Executive Committee, taking into consideration the context of funding capacity, broader investment goals, and objectives.
3. Final determinations are made by the United Way of Abilene Board of Directors. Notification of decisions will be made in December 2019. United Way of Abilene's community investment process involves extensive community input, transparency, and due diligence. All decisions by the United Way of Abilene Board of Directors are final. United Way of Abilene makes investments and does thorough program reviews on a 3-year cycle. At the discretion of the United Way of Abilene Board of Directors, CIRT, and staff, programs may be invited to enter the 3-year cycle.

The following criteria will be evaluated for all submitted applications:

- Alignment with United Way of Abilene focus and priority areas
- A clear and compelling program design that would enable a layperson to understand the activities and work of funded programs
- A clear plan for addressing community needs through the proposed program, including plans to reach those most in need
- A description of the target population and the strategies used to engage the target population
- Clearly articulated indicators and metrics to enable evaluation of the impact of the program
- Demonstration of resources and collaborations used to reach desired outcomes for the target population
- Documentation of additional financial resources to ensure viability of the program in the short and medium terms
- A financially sound and programmatically appropriate budget

Programs that are awarded 2020 investment will be expected to participate in the following:

- Enter into a Community Partnership Agreement with United Way of Abilene prior to receiving any funding
- Submit program and financial progress reports as specified within the Agreement
- Participate in periodic site visits by United Way staff, donors, or volunteers during the investment period
- Participate in United Way of Abilene activities and capacity-building activities as specified within the Agreement
- Recognize United Way of Abilene as a key partner in promotional materials and communications as specified in the Agreement

Continuing Assessment

As noted above, United Way of Abilene requires programmatic and financial progress reports during your investment period. These reports will be used to ensure that the program is meeting its performance targets, and that participants are experiencing the intended program benefits. Continuation of funding during the investment period is contingent upon program reporting and performance.

All funded programs must be positioned to gather data to enable timely reporting. Reports will be submitted electronically, as determined by United Way of Abilene. All invested partners are expected to cooperate with assessment activities deemed necessary by United Way of Abilene. Applicants may propose or complete their own evaluation activities, but these may not be in lieu of participation in United Way of Abilene reporting.

Additional Information

If you have questions regarding any aspect of the Letter of Intent or Community Investment process, please contact: Bethany Ashlock, Community Impact & Marketing Director at bethany@unitedwayabilene.org or 325-677-1841.

Letter of Intent for 2020 Investment

Due June 24, 2019 | 3:00 p.m. | 5 Copies Required



Organization Information

Agency Name:

Address:

City, State Zip:

Phone:

Website:

Exec. Director	Name	Phone	Email
Program Director	Name	Phone	Email
Board Chair	Name	Phone	Email

Briefly explain your agency mission and how you accomplish your mission:

How long has your agency been in existence?

Date of last audit or upcoming audit estimated completion date?

Total agency budget:

United Way of Abilene serves the 19 counties of West Central Texas. Of the 19 counties, which counties does your agency provide services to?

Program Information

Program Name:	Impact Area: <input type="checkbox"/> Education <input type="checkbox"/> Income <input type="checkbox"/> Health
Funding Request Amount:	
Which priority area will this program address?	
Briefly explain your program:	
Briefly describe the need in the community for this program:	
Briefly describe the population impacted by the program or service:	
Describe the desired program outcome(s) and how they will be measured:	

Signatures Signatures certify that all information in this Letter of Intent is true and complete to the best of my knowledge.	
Exec. Director	Signature:
Board Chair	Signature:

Required Documentation | Please attach required documentation behind the last page of the Letter of Intent.

- 501(c)3 IRS determination letter
- Board of Directors Roster
- A copy of your most recent audit
- Current summary agency budget
- While not required, you may submit an agency/program brochure or other collateral.