United Way
CIG Orientation Questions and Responses

This document lists each of the questions that were asked in each of the Community Impact Grant Orientation sessions and provides the response given to those questions. Applicants who wish to see the questions and responses from sessions they did not attend can do so with this document.

**PROCESS**

**When will the application be due?**

*February 11, 2022, by 5:00pm Central Time.*

**What is the range of grant award/grant ask amounts?**

*The minimum grant award and therefore minimum grant ask is $30,000 and the maximum grant award and therefore maximum grant ask is $500,000.*

**Should our annual dollar amount request be reflective of any historical funding from UW has been?**

*No. In each cycle all applicants are starting from zero, so the annual amount request does not need to be reflective of historical funding from United Way.*

**Does United Way have a rule against funding new organizations or organizations that have not received a grant before?**

*No. In each cycle all applicants are starting from zero and in our last cycle about 25% of grantees were “new” to United Way Community Impact Grant funding.*

*If an applicant that is a new organization can meet the eligibility requirements in the RFP, then they are able to apply. We will note that applicants that can demonstrate the impact of their work on the clients they serve will generally compete better in the application process. If a new organization has limited history, while they are able to apply, they may not be as competitive in the process.*

**If you submit an application for collaborative work, can your organization be the lead applicant + submit an application separately for your organization?**

*For the 2022-2025 Community Impact Grant RFP, organizations can submit one application for their organization’s own programming. This application is designed to be holistic and can cover any of an organization’s programming that aligns with our Impact Areas and Community Indices in Education, Income, and Health.*

*In addition to or instead of one application focused on their individual organization’s work, an organization may apply multiple times as either the fiscal sponsor or lead organization for a collaboration or collective impact program or as part of a different collaboration or collective impact program.*

**Are zip code focus areas hard and fast? Our agency is not in one of those areas, but we provide housing and help for 100% LMI homeless people.**
Yes, the zip codes listed in the RFP are UWMD’s Geographic Priority Geographic Areas for the 2022-2025 Community Impact Grants. We do however expect that some organizations may provide needed services to communities that are outside those areas, and we have funding goals that incorporate that. Priority Geographic Areas are just part of the information we consider when we review applications.

Are virtual site visits possible for organizations with remote staff/online services?

Yes, in the application there is a question about whether your organization can host an in person visit or if it would need to be entirely virtual. Right now, where possible, we are planning for site visits to be accessible either in person or virtually. It is also possible that in mid-March the situation may present itself where all site visits will be entirely virtual.

**STEWARDSHIP**

What are the ratios calculated as part of the Stewardship review?

United Way calculates two ratios as part of the Stewardship review process. The first is the organization’s cash on hand or liquidity and the second is the organization’s program expense. United Way uses a guideline about having 30 days of cash on hand or more and the second guideline is to have the program expenses of 70% or more. Neither number is a firm requirement, but we do use those guidelines as part of evaluating the Stewardship.

Do you need contact information for Board of Directors?

For the uploaded Board Roster document in the Stewardship section, no, we do not need the contact information for Board of Directors to be included.

In the Contact Information section of the application, question #16 does ask for the Board Chair’s contact information. For this question, yes, we do need the Board Chair’s contact information so that we can include them in a potential grant award announcement and to sign a grant agreement.

Please clarify the date range for the unaudited financial statements that are required for the application.

The three most recent months of unaudited financial statements have to be the most recent months possible. Because the application is due in February the statements could represent either November 2021, December 2021, and January 2022 or the statements could represent October 2021, November 2021, and December 2021. For this part of Stewardship, we do not want unaudited financial statements prior to October of 2021.

If an organization will be getting its first audit this year but it is not available at this time, does this automatically disqualify?

If the organization’s gross Annual Budget (Line 12 of Form 990 Tax Return) exceeds $750,000 then the organization must provide the most recent independently audited Financial Statements. If that independent audit is not available by the deadline of February 11, 2022, then yes, the organization would fail Stewardship for not having the required documents and would not be selected.
If the organization’s gross Annual Budget (Line 12 of Form 990 Tax Return) is less than $750,000 then the organization does not need to provide an Independent Audit and therefore would not be automatically disqualified for not having the required documents.

If our current 990 is not ready yet is it okay to use a prior year?

Yes, assuming your prior year Form 990 has a year end date no older than February 11, 2020. If that is the case, then it meets the requirements.

In an application for a collaboration or collective impact program, do all the partners need to pass stewardship?

No, only the lead organization or fiscal sponsor for the collaboration or collective impact program needs to submit Stewardship documents in the application. The lead organization or fiscal sponsor must pass Stewardship, but each additional partner will not be evaluated for Stewardship.

APPLICATION

Is there a limit to the percentage or amount of funding United Way would provide in relation to program or organization budget?

Historically, UWMD had a metric where we would not support more than 50% of a program’s budget. Now that the grant dollars are unrestricted, and we have removed a program budget from the application, this guideline becomes that United Way will not support more than 50% of the organization’s budget. This amount is also still subject to the standing range of grant award amounts (see question #2 below).

What if we don’t track demographic information about our clients?

In the section of the application called “Number of Unduplicated Clients”, each of the five categories of demographic information has a row for “unknown”. If you don’t track that type of demographic information at all, or if you only have that demographic information for a portion of your clients, you can use that row.

Can you save each section of the application while working on it?

Yes, each task in the application can be saved before moving on to a different task. In some cases data must be entered into each required field in order for it to be saved, but placeholder data can be entered until a full response is put in place.

Can our application go across Impact Areas?

Yes, if your organization provides services that cross United Way’s Impact Areas of Education, Income, and Health, then the application can be done in that manner.

For the organization budget and comparison does it need to be detailed with all programs outlined/included?

There is no requirement for how detailed the organization budget needs to be. Typically, we want to the organization to upload a standard budget that already may exist and be used for other reasons. There is a
Is there a preference to use the provided common measures vs. write in measures? Is one weighted more highly than the others?

There is no difference in the weights. United Way would like for at least one of the provided measures that relates to the services described in the application to be selected and then write in measures can be added. Reviewers may be able to see better alignment of services and United Way’s funding areas if provided common measures are selected.

What are the different time frames of data for the various sections in the application?

The Unduplicated Clients section asks for one year of historical data, the current year, and a projection for year 1 of the grant.

The Common Measures section asks for one year of historical data, the current year, and a projection for year 1 of the grant, year 2 of the grant, and year 3 of the grant.

The organization budget is your current year budget with a comparison to previous year.

In the online application itself, the actual date ranges are provided for additional clarification.

Can we apply for a community that we don’t currently serve or formerly served, but need funding to serve that area?

If the community falls within UWMD’s geographic service area, then yes, an applicant can do this.

Is the unduplicated clients section for the whole organization or the program you are writing for?

The unduplicated clients section should represent the services/program described in the application. Depending on how you write the application and what services your organization provides, that could represent the entire organization or a part of the organization.

Is there an opportunity to submit a proposal for a new program initiative?

Yes, applications can be submitted for a new program initiative. We would caution applicants that our Community Impact Grants are highly competitive and a new program initiative that cannot demonstrate impact and results may be less competitive in the process. Where we have seen this done successfully in the past is where the applicant can demonstrate success in other communities where these services already exist and may be transferred successfully to our area.

For the organization budget upload in the application, are applicants aligning our budget to the United Way’s funding year of July-June or our organization’s fiscal year?

For question #30, which is where the organization’s annual budget is uploaded, please use your organization’s fiscal year. It does not need to be redone to align with United Way’s fiscal year.
OTHER

What does an unrestricted grant award mean?

An unrestricted grant is a grant that allows the organization to spend the grant award in any way they choose. This is also known as flexible funding and the grant comes without donor restrictions of any kind.

How many applications does United Way typically receive?

In our most recent grant cycle, 2019-2022, United Way received approximately 200 applications from different organizations.

Would applications for collaboratives potentially affect the funding amounts for the individual orgs within the collaborative if all are applying as individuals, or will consideration be separate?

Each application is evaluated separately. There is a grand total amount of dollars that United Way can invest in our Community Impact Grants so in that sense the applications would be competing against each other.

Are organizations able to be considered for both the CIG and Social Innovation Accelerator (SIA)?

Broadly, being a Social Innovation Accelerator Fellow does not exclude an organization from applying for/receiving a Community Impact Grant. Receiving a Community Impact Grant does not exclude an organization for applying for the Social Innovation Accelerator Program.

However, these programs are designed with different intentions and requirements to where an organization best suited for SIA may not meet the requirements to apply for a Community Impact Grant and organizations that are competitive for a Community Impact Grant may not be best suited for SIA.

If you’d like to learn more about United Way’s Social Innovation Accelerator, please visit https://unitedwaydallas.org/accelerator/