

United Way Funding Application Guidelines

2026-2027

***Submission Deadline: March 2nd 4pm LATE OR INCOMPLETE
APPLICATIONS WILL NOT BE ACCEPTED.***

Our Mission

To improve lives and build communities by engaging individuals and mobilizing collective action

Guiding Principles

- United Way is committed to addressing and funding current and emerging human service needs in the community.
- The relationship between the United Way, the agencies it funds and the public is based on trust. We aim to ensure that all our dealings are open, fair, easily understood and consistent with agreed-upon policies and procedures. United Way values the significance of citizen participation to the health of the community.
- Involvement of volunteers in policy formation and decision making is fundamental to the operation of United Way and voluntary agencies.
- United Way is accountable to its donors and the general public for responsible distribution of voluntary dollars.
- Funding decisions are based on established priorities and demonstrated needs as identified by United Way with input from agencies and the community.

Funding Criteria

Financial support from United Way of South Eastern Alberta:

- Will fit with the funding priorities, based upon demonstrated community needs that are established by United Way from time to time.
- Will be primarily in support of specific, defined programs that serve residents of the South Eastern Alberta region.
- Will be based on the availability of financial resources and the availability of other funding sources for the agency.

To accomplish its mission and objectives, United Way of South Eastern Alberta conducts an annual fund distribution process to examine the funding requests of agencies. an Allocations are carried out by volunteer citizens and board members that reflect, to the greatest degree possible, the diversity of our community.

United Way Community Impact Areas

Like so many United Ways across the country, United Way of South Eastern Alberta is a successful and trusted fundraising organization. We recognize the positive impact fundraising has on our community partners and the people we serve. We improve lives by mobilizing the financial resources of businesses, employees, individuals and foundations in support of direct service programs at agencies that measurably improve people's lives.

In addition, United Ways across the country have begun to recognize that they can contribute to a greater movement. The movement is called **Community Impact. It is about achieving meaningful, long-term improvements to the quality of life in our communities—addressing not just the symptoms of problems but also identifying the root causes.** It's about making fundamental changes to community conditions and not only providing a portion of monies raised through annual campaigns.

The following impact areas are the focus of funding for United Way of South Eastern Alberta:

All That Kids Can Be

Impact Statement:

To ensure children and youth are valued and supported members of the community and have the opportunities and resources to help them reach their full potential.

Healthy People, Strong Communities

Impact Statement:

To improve opportunities for people to access programs and supports that empower them to overcome barriers, build resilience, reduce isolation and be part of a caring, inclusive community.

From Poverty to Possibility

Impact Statement:

To help people engage in their community by strengthening neighbourhood revitalization efforts, reducing poverty and improving access to affordable housing.

ELIGIBILITY

Eligibility for United Way funding is based on the following criteria:

- The applying agency provides programs and/or services to residents of Medicine Hat & South Eastern Alberta
- A local volunteer board of directors governs the agency
- The agency provides annual financial statements
- The agency has an active, charitable status with Canada Revenue Agency

United Way of South Eastern Alberta **does NOT fund:**

- Services that are primarily religious or political in nature
- Organizations acting in the capacity of a funding body
- The arts (unless tied to social programming)
- Medical research
- Capital costs
- Individuals

Please be advised that the United Way of South Eastern Alberta is not in the position to meet all recognized needs within the community. It is therefore possible that an agency might meet or exceed expectations on all criteria and still not be awarded funding. Funding will be allocated to areas of the greatest perceived community needs first.

Once an agency is approved for and accepts funding for ongoing programs from United Way of South Eastern Alberta, it is subject to all policies and allocation procedures and must abide by the Funded Agency Agreement (Appendix A).

EVALUATION OF APPLICATIONS AND FUNDING RECOMMENDATIONS

The Allocations Committee's funding recommendations will be based on the agency's performance against the United Way's values and funding criteria. All applications are reviewed by a group of volunteers who utilized a standardized scoring matrix on behalf of the community to compare applications and recommend funding levels for social service programs delivered through United Way member agencies.

Once recommendations have been made by and approved by the Board of Directors of the United Way of South Eastern Alberta, allocations will then be distributed as described below.

PAYMENT OF ALLOCATIONS

The approved allocation shall be dispensed in three installments beginning April 1st (50%) of the grant followed by July 1st (25%) and October 1st (25%). The approved allocation will be paid in full, except where, after discussion, significant changes in the circumstances of the United Way or the agency indicate otherwise. If the agency is not using the funds as stated in their proposal, the United Way of South Eastern Alberta reserves the right to withhold future instalments until it is satisfied that the funds are being used appropriately.

NON-OPERATING FUNDS

United Way funds are to be used for operating purposes; that is, expenditure items that are consumed during a normal operating year or cycle. In special cases or under unusual circumstances, United Way may agree to fund essential non-operating items based upon the merits of each individual case. But as a general rule, United Way does provide funding to capital campaigns.

S.M.A.R.T. GOALS

In Section 3 of the application for funding, United Way asks you to describe your goals for a program in a S.M.A.R.T. way.

Consider the following definitions when responding to this question:

- *Specific* – target a specific area for improvement.
- *Measurable* – quantify or at least suggest an indicator of progress.
- *Assignable* – specify who will do it.
- *Realistic* – state what results can realistically be achieved, given available resources.
- *Time-related* – specify when the result(s) can be achieved.

For more information about S.M.A.R.T Goals and how to develop them, please visit the Wiki at https://en.wikipedia.org/wiki/SMART_criteria .

POLICIES

Reserves

United Way of South Eastern Alberta believes that stability of agencies within the not-for-profit sector is good for the sector and good for the community as a whole. This policy encourages the creation and maintenance of unrestricted reserve funds to contribute to the agency's stability. Where this reserve fund is already in existence, this policy encourages transparency.

United Way will not penalize an agency for creating a reasonable unrestricted reserve fund. In the interest of fairness to other organizations and the community as a whole, if an agency has an unrestricted reserve fund of more than the amount equal to 1 year of operating expenses, the agency may have their United Way of South Eastern Alberta allocation amount reduced appropriately, based on the discretion of the United Way's Board of Directors.

Financial Statements

United Way of South Eastern Alberta believes that accountability and transparency are the cornerstones of ensuring public trust. Agencies must submit independently produced, LOCAL financial statements for the most current fiscal year end referenced in the funding application, in the form of an audit or review engagement prepared by someone qualified to do so and who is at arm's length from the organization. In the case of local chapters of national organizations where local statements are not available, please provide national or provincial audited statements with a spreadsheet detailing local chapter and program expenses.

Annual Budget

United Way of South Eastern Alberta believes that effective financial management practices dictate the need for a diversified funding base within each organization. Therefore, United Way of South Eastern Alberta may not allocate an amount that represents more than 50% of the Member Agency's total annual operating budget vs. program budget. Those whose funding currently exceeds 50% of their annual budget may have their allocation reduced appropriately, based on the discretion of the Board of Directors, for amounts over \$10,000.

Questions

If you have questions not answered here, please do not hesitate to contact the office for further information.

APPENDIX A

FUNDED AGENCY AGREEMENT

Note: The board of directors of each funded agency is responsible for attaining a working knowledge of this policy and assuring the agency's compliance.

Preamble:

This agreement sets out what actions and responsibilities are expected of a United Way funded agency and what actions and responsibilities are expected of United Way of South Eastern Alberta.

United Way of South Eastern Alberta and the funded agencies are partners who work together to provide needed social services to the community. United Way facilitates co-operation between agencies, where appropriate, and looks to minimize duplication of efforts and redundant expenses where possible.

United Way of South Eastern Alberta was established to build fundraising partnerships where all possible fundraising campaigns in the areas of community and social services in the South Eastern Alberta region, including local, provincial and national service organizations can work together under the United Way brand to reduce expenses and increase effectiveness.

United Way is dedicated to organizing volunteers to conduct an annual campaign to raise funds to meet the specified program needs of its funded agencies within the limits described in this document.

Sample Grant Agreement Follows.

SAMPLE

United Way of South Eastern Alberta Agency Agreement

Agreement between:

Charity Name

(Hereafter referred to as "The Agency")

-and-

United Way of South Eastern Alberta (Hereafter
referred to as "The United Way")

This Agreement made for the period of April 1, 2024 to January 31, 2024 between *Charity Name* and United Way of South Eastern Alberta.

The United Way and The Agency undertake and agree as follows:

Article 1.

- a) The United Way will conduct an annual campaign during a period to be determined by the Board of the United Way within the months of September to December for the raising of funds for the benefit of registered charitable agencies.
- b) The United Way will distribute a total of \$XXX to the *Charity Name* (subject to the availability of funds). Funds will be forwarded in 3 Payment(s) of \$*** on a schedule detailed in the attached letter.

Article 2.

- a) The Agency will inform the United Way Board of Directors of any fundraising efforts not included in the original application during this period 30 days prior to the actual event.
- b) The Agency will not take any action, which will alter its budget as accepted without prior notice to the United Way Board of Directors.
- c) The Agency will actively participate in fundraising campaigns and special events of the United Way to the best of its ability and will promote the United Way on a year-round basis including, but not limited to newspaper, radio and television releases, literature, letterheads, and other printed matter, as appropriate. United Way logos will be provided on request.
- e) The Agency will be asked to submit a final report for the program/service which was funded. A reporting document will be made available to The Agency on or before December 10th 2026 and must be completed and submitted to the United Way by January 31st, 2027.

SAMPLE cont'd

Article 3.

- a) United Way may terminate this agreement at any time if there is evidence The Agency is not making use of the funds as outlined in the Funding Application Package.
- b) United Way may terminate the agreement for cause within 30 days written notice.
- c) The Agency may terminate the agreement with 30 days written notice but must provide an accounting of funds already expended and return unexpended funds to the United Way within 30 days of termination.
- d) At the time of termination, the United Way Board of Directors reserves the right to determine an alternative disposition of any remaining assets held in trust upon mutual agreement of the parties.

***Charity Name*:**

I warrant that I have the legal authority to bind *Charity Name* to the terms set forth in this agreement and by affixing my signature do hereby agree to bind the organization and its board of directors to comply with the terms of this contract.

Signed:

Executive Director or Board President
Charity Name

Date:

United Way of South Eastern Alberta:

I warrant that we have the legal authority to bind United Way of South Eastern Alberta to the terms set forth in this agreement and by affixing our signatures do hereby agree to bind the organization and its board of directors to comply with the terms of this contract.

Signed:

Board of Directors, President

Executive Director

Date:
