



**Roane County United Way (RCUW)  
Community Investment Grant  
Process Description and Rating Criteria  
2021 FUNDING PERIOD: May 2021- April 2022**

Community Investment (CI) grants support on-going/continual service delivery with the goal to help more members of our community to achieve: healthier lifestyles; enhanced levels of education and job qualification; and financial stability. CI is about working together to pursue significant, lasting change at the community level. A community is defined by a large part of Roane County's (R.C.) total population sharing one or more characteristics (age, gender, income level, geographic area, etc.).

Roane County United Way is focused on the efforts and investments to influence our community with a focus on specific community populations rather than direct services to individuals.

**Grant Proposal Process**

Steps in the process include:

1. Organization Qualification
2. Volunteers' Review
3. Interview
4. Funding recommendation

Each stage of the process has unique requirements. The application and review process is intended to provide the applicant with the opportunity to share their story and provide details regarding not only the impact of the service on a community, but also assuring the use of funds aligns with RCUW's charitable mission.

**1. ORGANIZATION QUALIFICATION**

An applying organization must meet the following qualification criteria:

- The receiving organization is a legitimate nonprofit registered with the State of Tennessee as a charitable organization
- Provide all required documents noted on the instructions/checklist page; based on size of agency
- Serve residents of Roane County
- Service must have been provided a minimum 3 years for Roane Countians or be linked to a larger established organization.

NOTES: APPLICANTS MUST USE THE FILLABLE APPLICATION FORM, located at <https://unitedwayroane.org/2013/wp-content/uploads/2020/12/2021-Blank-CI-Grant-Application.docx>

**Application Deadline: January 22, by 5:00 pm**

An organization will NOT be considered for funding if they do not meet the qualifications described above or submit a full, completed application package by the deadline (Jan. 22 by 5:00 p.m.). If the organization is unable to submit any of the requested documents; include a statement with an explanation as to why you are unable to submit a document(s) which will then make an acceptable application package.

Missing or incomplete documentation or not using the file naming recommendation will result in the rejection of your application. Do not include a cover letter or brochures.

RCUW provides funding for a single service and an organization may apply for funding for more than one service by completing one section of the application for each service that funds are requested.

## 2. VOLUNTEERS' REVIEW

The application review volunteers are looking to learn more about your organization and the service(s) it provides. We are looking for a clear match between the goals and outcomes for the services, your organization's ability to meet those goals and align with RCUW's service model.

*\* Please note when asked about impact- inputs are not measurable outcomes. An outcome is the level of performance or achievement that occurred because of the activity or services your organization provided. When discussing outcomes, please consider and report the impact (effectiveness) the program has on the Roane County community not just the numbers you serve.*

Due to the COVID pandemic, organizations may have had a change in scope of services or accommodate a change of services, please describe and include impact of those changes to your organization.

Financial and managerial stewardship is a key component of the review process.

Organizations with programs that provide services that meet the biggest needs identified and requested by R.C. residents as well as meeting ALICE (Asset Limited, Income Constrained and Employed) population criteria will be given priority.

\*A site visit may be required as part of the application process. If you are approved for a Roane County United Way grant you will be assigned a reviewer who may personally visit your site and/or communicate with you during the grant period. If this will be required, your organization will receive a request regarding the date and time for a site visit.

Applications undergo a rigorous assessment and scoring process by the panel of community volunteers. During the review process, an evaluation and rating is completed based on the following areas:

<ul style="list-style-type: none"> <li>• Financial</li> </ul>	<ul style="list-style-type: none"> <li>• Managerial Stewardship (Governance)</li> </ul>
<ul style="list-style-type: none"> <li>• Outcomes Achieved (Past results)</li> </ul>	<ul style="list-style-type: none"> <li>• Funds Request               <ul style="list-style-type: none"> <li>○ Alignment with goal (healthier lifestyles, enhanced levels of education and job qualification, and financial stability)</li> <li>○ Alignment with service model</li> <li>○ Furthering of goal to pursue significant, lasting change at the community level</li> <li>○ Need identification and expected service delivery impact</li> <li>○ Expected outcome(s)</li> </ul> </li> </ul>
<ul style="list-style-type: none"> <li>• Financial need for RCUW funds</li> </ul>	<ul style="list-style-type: none"> <li>• Application clarity and thoroughness</li> </ul>

The completed application and supporting documents should provide sufficient detail in the following areas for the review panel to make an informed funding recommendation.

- The organization has a management team with a track record of leadership and performance
- Description of how and what the funds will be used for in association of the delivery of a service

- Specifically address how the service is a strategic fit with a single area of achieving: healthier lifestyles, enhanced levels of education and job qualification, and financial stability.
- Description of how and why the service has been effective and how and what type of positive impact occurred for the service recipients
- Demonstrate the organization is financially sound
- Meaningful measured results (number served is the minimal measured result)
- Description of an active Board of Directors

Resources to assist during the application preparation are provided on the Tennessee’s Charitable Solicitations, Fantasy Sports and Gaming, <http://sos.tn.gov/charitable-solicitations-and-gaming/charitable-organizations-helpful-links> and the RCUW website, <http://unitedwayroane.org/resources/>.

### 3. INTERVIEW

The reviewing panel is trained prior to the review and provided interview guidelines including they adhere to RCUW’s core values and assure a friendly environment. The interview’s purpose is to solicit clarification on information provided within the application package.

The reviewing panel will submit questions to the applicant in advance of the interview along with the logistics details. The interview questions are to obtain clarification and/or additional information in order for the panel to make an informed funding recommendation. The applicant is encouraged to bring their Board Chair and Treasurer to the interview.

### 4. FUNDING RECOMMENDATION

The panel rates each applicant and discusses their observations prior to preparing a funding recommendation to be submitted to the RCUW Board for final consideration and approval.

Written notices will be distributed to all applicants of the Board’s approved funding decision and, for those to receive funding; a partnership agreement is signed prior to the funds distribution.