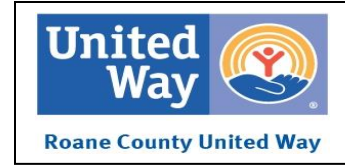


***Roane County United Way Fights for the Health, Education and Financial Stability of Every Person in Roane County.***



**Roane County United Way (RCUW)  
Community Investment Grant  
Process Description and Rating Criteria  
2023 FUNDING PERIOD: May 2023-March 31, 2024**

Community Investment (CI) grants support on-going, continual service delivery to organizations that are in alignment with the United Way's mission: ***Supporting healthier lifestyles, enhanced education/employment opportunities, and the financial stability of residents of Roane County.*** RCUW invests in initiatives that enable organizations to make a significant impact on our community populations rather than direct services to individuals.

CI grants can be submitted for organizations serving residents of Roane County that are well-established, or have received Community Enhancement (CE) grants for 3 or more years for the same program. There is no minimum requirement for the amount an organization may request for funding.

### **Grant Proposal Process**

1. Organization Qualification
2. Application Process
3. Volunteers' Review
4. Interview
5. 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 the impact of the service on our community, ensuring the use of funds align with RCUW's mission, and the organization is poised to carry out the service.

- 1. ORGANIZATION QUALIFICATION - An applying organization must meet the following qualification criteria:**
  - The receiving organization is a nonprofit registered with the State of Tennessee as a charitable organization
  - Provide all required documents noted on the instruction/checklist page, based on the size of the agency

- Serve residents of Roane County
- Service must have been provided for a minimum of 3 years for Roane County residents or be linked to a well-established organization that has been in existence for a minimum of 3 years

**2. APPLICATION PROCESS - For the Community Investment application, applicants MUST USE THE FILLABLE APPLICATION FORM, located at <https://form.jotform.com/213155965321050>**

- Application Completion Deadline: **January 21, 2023 by 5:00 p.m.**
- If an applying organization is unable to submit any of the requested documents, include an explanation statement as to why you are unable to submit specific documents, which will allow the application to move forward.
- Missing or incomplete documentation, or not using the file-naming recommendation within the application, will result in the rejection of your application.
- Do not include a cover letter or brochures with your application.
- Applying organization may request that RCUW provide funding for multiple services with one application by completing one section of the application for each service that funds are being requested for.

**3. VOLUNTEERS' REVIEW - Applications undergo a rigorous assessment and scoring process by a panel of community volunteers. The completed application and supporting documents should provide sufficient detail for the volunteer review panel to make an informed funding recommendation. An evaluation and rating is completed based on the following areas:**

- A clear match between the goals and outcomes for the services an organization intends to provide and the organization's ability to meet those goals.
- Priority will be given to applications that provide services most requested by Roane County residents and/or meet the needs of the ALICE population (Asset Limited, Income Constrained and Employed).
- How the potentially funded program fits into the mission of RCUW, i.e., promoting healthier lifestyles, enhanced education/employment opportunities, and the financial stability of residents in Roane County.
- Description of how and why the program has been effective in the past and what kind of impact occurred for the service recipients.
- Expected Impact and Outcomes of potential funding request
  - Impact is not a measurable outcome - it is the correlation between the program and the continuing effect it will have to instill lasting change in the Roane County community.

- Measurable Outcomes - number of residents the funds are expected to serve.
- Describe how and what the funds will be used for in the delivery of a service.
- Financial and managerial stewardship (Governance) is a key component of the review process. Does the organization have a management team with a track record of leadership and is it financially sound?
- Description of an active Board of Directors.

**4. INTERVIEW - The purpose of the interview is to solicit clarification on information provided within the application package.**

- The review panel is trained prior to the review and provided interview guidelines including they adhere to RCUW's core values and assure a friendly environment.
- Applicant will receive questions from the review panel prior to the interview, along with any logistic details.
- Applicant is encouraged to bring their Board Chair and Treasurer to the interview.

**5. FUNDING RECOMMENDATION - The panel rates each application and discuss potential grant recipient organizations.**

- Funding recommendations are prepared and submitted to the RCUW Board of Directors for final consideration and approval.
- Written notices are mailed to all applicants of the Board's funding decisions.
- Agencies who are allotted grants will be required to sign a partnership agreement with the Roane County United Way prior to funds being distributed.
- Community Investment Grants are paid in quarterly payments,  $\frac{1}{4}$  of the allotted amount each quarter.
- Community Investment grant recipients are required to completed a mid-year outcome report and a final outcome report. Failure to submit outcome reports will affect future grant consideration from RCUW.