



United Way
Hastings &
Prince Edward

2025

APPLICATION

GUIDELINES &

SUPPLEMENTARY

FUNDRAISING

POLICIES

A tool to assist with determining eligibility, strategic fit, and completing the application. This document also outlines United Way Hastings & Prince Edward's supplementary fundraising policies.

For important details, please be sure to review the **Call for Proposals**, which can be found at www.unitedwayhpe.ca

Introduction

United Way Hastings & Prince Edward is a highly successful and trusted fundraising organization that strives also to achieve meaningful, long term improvements to the quality of life in our communities. Our goal is to help make fundamental changes to community conditions while continuing to provide support through annual fundraising campaigns.

Mission

To provide leadership in a collaborative manner with our Funded Agencies and others to increase the capacity of our community to respond to human services needs.

Vision

Our community is a great place to work, live and play because all citizens, through the caring and generosity of its members, have equal opportunities and access to human services and development.

Background to Community Impact Strategy

United Way Hastings & Prince Edward is proud to be a respected fundraising organization and trusted community partner. In an effort to continue to bring about measurable and permanent change for people throughout Hastings and Prince Edward Counties, United Way Hastings & Prince Edward has created three priority areas that are supported by the communities' not-for-profit social services sector. These priority areas include All that Kids Can Be, From Poverty to Possibility and Strong Communities.

Each of these priorities is part of a larger strategy known as Community Impact (CI). Community Impact can be defined as making fundamental changes to community conditions, which includes, but is not limited to allocating funds through the annual fundraising campaign. Ultimately, it is about people and organizations coming together to create lasting measurable change.

The CI strategy will be achieved by identifying the root causes of key local issues, developing strategies to address them, bringing together the funding and resources needed to get the job done, and finally, measuring the results.

Investment Criteria

Within this investment process, funding will be awarded to successful applicants for a one-year funding period.

United Way Hastings & Prince Edward has established **four key investment principles** that will guide investment processes ensuring financial contributions remain:

- **Focused** - United Way Hastings & Prince Edward supports strategies that align with its strategic focus areas based on in-depth community research. Investments are open to all organizations and associations that meet current eligibility requirements and that demonstrate their work aligns with the impact agenda.
- **Balanced** - United Way Hastings & Prince Edward invests in both proactive prevention services as well as reactive responsive interventions and strives to balance investments to ensure one is not over-represented.
- **Impactful** - Community investments support strategies that focus on measurable results that are proven to build a stronger community. We collect, analyze, track and share information on these results.
- and **Financially Accountable** - United Way Hastings & Prince Edward will invest funds in programs and services where the agency can demonstrate:
 - Strong and transparent financial accountability.
 - Sustainability and viability.
 - Financial need for support.

Basic priorities, long-term and short-term outcomes are explained below. However detailed **Guidance letters** are available for each, inclusive of indicators for measurement and basic descriptions of the programs and services that United Way Hastings & Prince Edward will fund within each of the priorities. Guidance letters will serve as a tool in the evaluation of submissions through the citizen review process and the evaluation rubric is included for agencies reference.

Those Guidance Letters can be found at <https://unitedwayhpe.ca/investment-opportunities/> and on the E-CImpact website. Please carefully review these prior to completing an application.

All That Kids Can Be

From Poverty to Possibility

Strong Communities

Engagement in Learning

Children and youth are supported in their optimal development and prepared initially for school, for the challenges they face and for transitions to post-secondary education and meaningful employment.

Connectedness & Community Involvement

Young people feel respected and trusted within the communities they live creating a strong sense of place and belonging where youth thrive and contribute, empowered to meet the high expectations they have of themselves and their community has for them

Emotional & Physical Wellbeing

Young people have meaningful, healthy relationships with at least one adult and benefit from accessible and affordable opportunities to form healthy peer relationships and lifestyles

Access to Basic Needs

To reduce the human, social, and economic costs of poverty on our community by improving access to and affordability of the basic needs of life

Employment, Skills Building & Financial Security

To improve opportunities for individuals to retain and maintain family-sustaining, meaningful employment or income that promotes economic self-sufficiency

Improving the Service System

To strengthen a service system that supports a 'person-first' approach, with increasing integration and collaboration among community services, improved access through intensive case coordination and decentralizing service delivery.

Neighbourhood & Community Engagement

To encourage an increased sense of neighbourhood where people interact, become involved in and contribute in various ways to their community.

Connecting People to Supports

To ensure people in our community are aware of and able to access programs and services relevant to their needs .

Personal Wellbeing & Safety

To strengthen our community, fostering an environment of health, safety and independence and better positioning individuals and families to react when their health and/or safety is compromised.

Increasing access to early learning opportunities in vulnerable neighbourhoods and beyond

Supporting parents with the tools and resources necessary to raise happy, healthy children

Increasing opportunities for children and youth to form positive relationships with peers and adults

Working toward an accessible and affordable transportation system connecting residents with their community

Strengthening literacy, employment, pre-employment and on-the-job skills training and development programs

Strengthening programming and improving access through intensive case coordination and service resolution as well as working toward increased coordination between services

Creating opportunities and places for individuals and families to feel a sense of inclusion and belonging in their neighbourhoods and community

Helping people find relevant and appropriate supports and services in their community, including neighbourhood outreach

Helping seniors and people with disabilities to live independently and sustain their health

Increasing access to resources that foster school success

Helping the community embrace the uniqueness of young people, building reciprocal trust and respect

Increasing access to recreational opportunities for children and youth locally

Increasing access to affordable and appropriate housing with the supports to maintain it

Increasing financial literacy and financial management for those living with low income

Building strong collaborative multi-sectoral networks to address poverty

Engaging individuals and families in their community through volunteerism or participation in community programs and events

Improving the service sectors knowledge of services and supports available in the community

Helping individuals and families better handle life's challenges by promoting mental wellness and supporting healthy life choices

Developing the skills necessary for youth to make a successful transition to adult roles, responsibilities and relationships

Increasing opportunities for meaningful engagement in their community fostering a strong sense of place and belonging

Providing opportunities for youth that mitigate risky behaviours and choices

Increasing access to emergency food supplies and creating opportunities for improved access to safe, affordable, nutritious food with the supports to maintain that access

Improving access to programs offering assistance in job search skills and providing accessible and affordable services to support employment and ensure basic needs are met

Working together to help individuals and families better navigate support systems by redesigning and decentralizing service delivery to community and neighbourhood settings understanding effective practices and impacts of hubs for residents

Providing opportunities for individuals and families to increasingly influence their community in positive ways by taking on leadership roles, participation in the democratic process and engagement in resident led initiatives

Working together to help individuals and families better navigate the service system by redesigning and decentralizing service delivery to community and neighbourhood settings

Creating neighbourhoods and homes that are safer for individuals and families, especially victims of violence and abuse

For full details on long term outcomes, short term outcomes, strategies and indicators, please see the Guidance Letters.

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Measurement and Reporting

United Way Hastings & Prince Edward has developed standardized Indicators for each outcome under the three priority pillars. By standardizing the way, we define indicators, and identifying which indicators are commonly measured and reported, United Way Hastings & Prince Edward can accurately measure the impact of funding and increase the consistency in our reporting of performance and community impact data.

Programs must measure a minimum of one standardized indicator for each funded program and may choose to measure an additional agency identified indicator.

Mandatory Progress Report Schedule:

One-year grant – Annual reporting cycle, at time of grant application or at the end of the funding term. Additional interim check-ins may be required.

Annual Reporting

Annual requests for investment will now also combine reporting metrics for the previous funding period. You can view how to complete these changes in a series of web videos available in the agency Resource Centre in e-CImpact or [Here](#).

Community Investment Process and Timelines

Agencies interested in applying for funding must complete United Way Hastings & Prince Edward's online Request For Investment Process.

Orientation sessions will be offered to applicants – they are not mandatory, but available to assist you as you move through the application process – please watch our website for dates and times.

All proposals that are complete and submitted on time will be reviewed by United Way Hastings & Prince Edward staff before being forwarded to a citizen review committee. Citizen Review teams, guided by United Way Hastings & Prince Edward staff and using standard scoring tools will make funding recommendations to our board of directors.

Eligibility Requirements

Every application organization must complete a Pre-Qualification as part of the online application to ensure compliance with criteria. Basic eligibility for United Way Hastings & Prince Edward includes, but is not limited to, the following.

- The agency must align with United Way Hastings & Prince Edward Community Impact Strategy and,
- The agency provides services to residents of Hastings County and/or Prince Edward County and,
- A volunteer Board of Directors governs the agency and,
- The agency provides audited annual financial statement and,
- The agency must be an organization that is a qualified donee under Canada Revenue Agency

United Way Hastings & Prince Edward does NOT fund:

- Organizations that are primarily religious in nature or political in nature
- The arts
- Medical research
- Costs for major capital equipment or expenses that relate to the construction of new buildings, renovations to existing buildings or the purchase of office equipment or furniture that does not have a direct relation to program delivery.

United Way Hastings & Prince Edward relationship with funded partners

The approved allocation shall be dispensed in twelve equal monthly instalments for the single funding year. The approved allocation will be paid in full within the allotted time frame, except where, after discussion, significant changes in the circumstances of the United Way Hastings & Prince Edward or the Agency indicate otherwise.

United Way Hastings & Prince Edward reserves the right to withhold monthly instalments should governance, stewardship or program delivery at the funded agency be compromised

The Application Process

All annual requests for funding will be completed on the e-CImpact online application system. To access the application please click [HERE](#) If you are currently funded by United Way HPE, please use your login and password. If you are applying for the first time, please create an account. A detailed Agency training manual on the application system itself can be accessed [HERE](#)

The application is completed in 3 parts, the agency information forms, the mandatory agency documentation to be uploaded, and the program information forms.

Agency information forms:

- Pre-Qualifications
- Agency Information
- Agency Surplus/Deficit
- Fundraising Events Primary

Documentation to upload:

- Board of Director listing (mandatory)
- Current Annual Report (If you do not have a Current Annual Report, please upload a document with an explanation of why.)

- Current Audited financial statements (mandatory)
- Current Bylaws (mandatory)
- Strategic Plan (If you do not have a Current Annual Report, please upload a document with an explanation of why.)
- Agency Financial Picture (mandatory)

The Agency Financial Picture requires that agencies download the Excel template from the e-CImpact Resource Centre, complete the form as required, and upload the final information into our document uploads area. For any questions about this or other upload requirements, please contact acooke@unitedwayhpe.ca

Program information forms (Please note: These forms will only appear once a program has been added to the application for the first time):

- Program Information
- Program Details
- Units of Service
- Program Success Story
- Impact Statements
- Program Statistical Information
- Program Consolidated Financial Information
- Budget Variance Explanation
- UWHPE CI Strategy Alignment
- Program Statistical Information and Budget Reporting Narrative (only for agencies with previous successful annual funding)
- Success Story Image (optional upload area)

The Program Details form requires that agencies provide ONE community statistic that supports the need for this program in the community, as well as discuss how their programs make an impact on this need. Please use the following as format guidelines:

- Our community experiences low on time graduation rates of just 69%, 12% lower than the provincial average. 83% of our program's youth who were academically at risk, graduated on time. (Source: Community Indicators Project website)
- 16.8% of families in our community are not food secure. 88% of our program's participants said they would not have been able to purchase the same amount of fresh food without the program. (Source: Hastings County Community Profile 2021)
- 38% of our community's population is 65+. 83% of seniors who participate in our program say that it enabled them to stay independent for longer. (Source: Community Indicators Project website)

You can access community data on the [Community Indictors Project](#) website. For any questions about this or other program information requirements, please contact Alyssa Cooke acooke@unitedwayhpe.ca

APPENDIX A

FUNDED AGENCY AGREEMENT & SUPPLEMENTAL FUNDRAISING AGREEMENT

Please note, these documents are intended to be used as a resource – United Way HPE reserves the right to modify the agreements prior to the funding year beginning April 2023.

Investment agreement

Parties to the Agreement:

«Agency_Name» and United Way Hastings & Prince Edward ("UWHPE"):

Amounts, Terms and Conditions *

United Way HPE pledges to provide the following investment according to these terms and conditions:

United Way will provide funding in equal monthly installments for the term of the grant, conditional upon subsequent campaign results and agency achieved outcomes as demonstrated in the required submission of progress reports.

A. United Way HPE also agrees to:

1. Identify as a funded partner and promote funded programs and initiatives through a variety of channels, including but not limited to: United Way's online listing of Priority Goal Program Investments, campaign materials, Story Bank and Seeing is Believing tours, as appropriate.
2. Provide support and information on the benefits and expectations of this funding relationship through an Orientation Session and/or ongoing communications.
3. Consult and provide guidance with respect to program evaluation, revenue generation and fundraising, upon request (when feasible).
4. Ensure regular and timely communications with funded priority goal partners on any matter that may affect the partnership or terms of the agreement.

B. «Agency_Name» agrees to the following conditions and policies:

1. Implement the funded program(s) or projects(s) as outlined in the approved proposal and notify United Way HPE immediately of any changes to the program agreed upon outputs or budget.
2. Use United Way funds only for the activities outlined in the approved proposal.
 - Note: The following expenses are ineligible under the terms of this agreement: retirement of debts or budget deficits; expenses related to construction or the development of facilities; participant or client wage subsidies or honoraria.
3. Maintain responsible management guided by a volunteer Board of Directors.
4. Attend sessions as needed on the benefits and expectations of this funding agreement.
5. Participate in community efforts and initiatives to advance the strategies related to the priority goals where appropriate.
6. Allow United Way staff and volunteers to visit the program site at times mutually agreed to in advance, and when feasible. This could include providing opportunities for United Way HPE staff to present to your board members or staff.

Reporting Policy

«Agency_Name» agrees to:

7. Provide progress report(s) describing activities and measurement (using provided templates) at least once per annum. This can be completed as either part of a subsequent annual funding request or if no further funding application is submitted, then as a separate final report at the end of the funding period. Please note that United Way HPE reserves the right to request interim progress reports, board meeting minutes, and finance reports, at any point during the funding period.
8. Report any anticipated unspent program dollars to the Director, Community Investment at United Way HPE before December 15th of each year of the funding term.

9. Notify United Way of any major organizational or programmatic changes. This includes reductions in outputs and number of clients served.
10. Funds can only be used to support the program they were intended for and can only be used for aspects of the program that were approved through United Way's Call for Proposals assessment process. Immediately report if your program/project is no longer in operation, postponed, or suspended temporarily.
11. Immediately report if your Canadian charitable status (and/or sponsor's status) changes.
12. Notify United Way of the date, time and location of your Annual General Meeting when it is confirmed and submit audited statements.

Agency Conduct and Activities:

This Policy is intended to provide guidance around funded agency employee, board, and other volunteer conduct, conflict of interest, and adherence to applicable regulations. The private conduct of each employee and volunteer is a personal matter except when such conduct compromises the reputation, image, or integrity of «Agency_Name» and/or United Way HPE.

«Agency_Name» agrees to:

13. Acquaint themselves with UWHPE's mission, vision, values, principles, and policies, and behave accordingly. Not participate in, condone, or engage in dishonesty, fraud, deceit, misrepresentation or illegal activities. Protect the reputation, image, and integrity of the funded program/agency, and United Way HPE. Potential or existing risks to reputation need to immediately be flagged for review by United Way HPE as they arise.
14. Avoid any conflict of interest or perceived conflict of interest. A conflict of interest is any situation where personal interest (such as financial gain, family relationships, etc.) appear to conflict, or could potentially conflict with the interests of the funded program. Any new or existing conflicts or potential conflicts need to immediately be flagged for review by United Way HPE as they arise.
15. Provide program delivery in compliance with all applicable federal, provincial and municipal laws, by-laws and regulations, including but not limited to any environmental legislation, human rights codes, legislation related to protection of information and privacy, and Public Health regulations. The funded program shall obtain, prior to the commencement of the program, all required permits, licenses, consents, and other authorizations necessary to run the program.

Agency Qualifications

«Agency_Name» confirms that:

16. The organization will use the provided funding for services to residents within Hastings County and/or Prince Edward County only.
17. The organization will actively plan, deliver and evaluate its funded programs and services.
18. The organization will maintain accurate financial and accounting records, and use budgetary controls and accepted best practices in internal financial control.
19. If and when requested, the organization will submit independently produced, local (within HPE) audited annual financial statements or review engagement prepared by an independent licensed public accountant in compliance with Generally Accepted Accounting Practices as applied to non-profit organizations.
20. The organization has and maintains a balanced budget, and/or ensures an agreed upon plan for meeting all deficits.
21. The organization is governed by an active and representative Board of Directors that serves in a voluntary capacity, with regular meetings, and is responsible for developing the organization's mission and strategic direction.

22. The organization has and follows its bylaws that state the purpose of the organization, make provisions for the size of Board of Directors and provide rules for selection, terms, number of officers and committees, financial and legal procedures, conflict of interest and quorum requirements.
23. The Board of Directors receives all necessary financial information at minimum on a quarterly basis.
24. The Board oversees the recruitment and ongoing management of the Executive Director/CEO or other comparable senior staff positions.
25. The organization ensures the fair and equitable treatment of all staff through compliance with all regulatory and legal requirements, and this compliance is reflected in Human Resources policies and practices.
26. The organization agrees to adhere to the United Way Hastings & Prince Edward Investment Guidelines including all applicable UWHPE policies and ongoing reporting requirements.
27. United Way HPE is unable to support requests made by individuals, medical research, arts, religious, cultural or political institutions. United Way HPE funding requests cannot be used towards fundraisers, capital campaigns and/or endowments. «Agency_Name» certifies that funding will not be spent within one of the above categories and will be spent on program delivery costs only, not for equipment/capital costs.

Marketing Support and Brand Standards Policy

«Agency_Name» agrees to:

28. Partner with United Way throughout the year to support marketing and content materials as well as outreach activities by providing access to the program delivery site(s) and/or a contact person(s) as appropriate for content such as, United Way's Story Bank, Seeing is Believing tours, Speaker's Bureau, Day of Caring days, and other engagement programs that help to demonstrate our work together in the community.
29. Assist United Way HPE in highlighting your successes to our community by tagging us when posting to social media about the program(s) for which you received support from United Way HPE.
30. Participate in donor recognition initiatives such as thank you cards and notes to donors as appropriate, thereby making a tangible connection between donations to United Way HPE and changed lives in the community
31. Partner with United Way HPE by following us on social media and sharing our content.
32. Portray United Way positively in all public communications.
33. Protect United Way HPE's brand identity by following brand and logo usage guidelines. Current logos and usage guidelines are available upon request, please contact klalonde@unitedwayhpe.ca

Public Recognition Policy

«Agency_Name» agrees to:

34. Acknowledge United Way HPE funding in media releases, media interviews, annual reports, newsletters, social media activities, videos and promotional materials, both online and in print.
35. Recognize United Way HPE's support at your events. Ensuring you have our pull-up banner and/or promotional materials on display.
36. Display United Way HPE's logo in your reports, newsletters, marketing materials, and social media posts for the program. This includes putting our logo on your website. The recipient must ensure that they are displaying the United Way Hastings & Prince Edward logo in accordance with current brand standards.
37. Display United Way HPE's logo at your location in a high traffic area such as your reception or meeting rooms. We will provide window decals and a plaque to be mounted. If you do not have one, please request through klalonde@unitedwayhpe.ca

Fundraising Blackout Policy

«Agency_Name» agrees to:

38. Adhere to United Way HPE's fundraising blackout period policy as described below:

Premise

The United Way HPE campaign operates on the premise that donors prefer a federated solicitation rather than multiple asks. During the months of September, October and November of each year, United Way HPE is conducting its annual campaign on behalf of the not for profit sector in Hastings and Prince Edward Counties.

Recognizing this, the Supplemental Fundraising Agreement enhances the United Way campaign while addressing the fundraising and public relations needs of Agencies. The ultimate goal of this policy is to maximize the funds available to funded partners so they can provide services to people in our community.

Policy

No major or extraordinary fundraising activities, as listed below, raising in excess of \$2,500 gross shall be sanctioned during the months of September, October and November (Blackout Period). Violation of this policy will result in an equivalent deduction from future installments and possibly a termination of the funding agreement.

- Solicitation of corporations for cash or in-kind donations, or sponsorship of events.
- Direct mail or mass telephone solicitations to the general public, including second party solicitations (e.g. Hydro inserts, flyers with newspapers)
- Major Special events such as dinners, Monte Carlos, dances, golf tournaments or benefit performances.
- Events soliciting pledges such as telethons, "walkathons", runs.
- Capital campaigns - to acquire real estate, repair or construct buildings and related facilities; the acquisition of or major repairs to significant items of equipment or furnishings.

Advertising/promotion in the months of September, October and/or November for events that occur outside of the blackout period should be limited

Note: If you have any questions about the blackout period or proper logo to use on any of your materials, please contact us at klalonde@unitedwayhpe.ca or 613-962-9531 for assistance.

C. «Agency_Name» and United Way HPE agree that:

1. United Way may terminate this agreement upon becoming aware that is or has been in breach of any of the terms and conditions of this agreement.
2. United Way or the funded partner is welcome to request a meeting with the other at any time throughout this funding agreement.

Note: Any failure to adhere to the above-described conditions, policies, and deadlines may result in an immediate hold on any future funding installments until such time as the conditions are satisfied and deadlines are met.

Expiration of the Agreement

- At the end of this agreement, unless a new agreement is approved following a Request for Proposal process, there shall be no continuation of funding.
- Should there be any changes to the terms, conditions or amounts listed above, United Way HPE may put a new agreement or amendment in place, which will supersede this agreement.