



United Way
Burlington &
Greater Hamilton
uwaybh.ca

Allocation Process

Mission: “To develop resources, raise funds, improve lives and strengthen our diverse community”

This effort will be facilitated through:

- Providing everyone with an opportunity to care and participate
- Fundraising in order to meet identified needs
- Allocating human and financial resources to meet identified needs
- Working collaboratively with the community to find effective solutions

Eligibility Criteria

To be eligible for United Way of Burlington & Greater Hamilton funding, all applicant agencies must meet the following eligibility criteria:

- Be incorporated and registered as a charitable agency with the Canada Revenue Agency and operating for a minimum of two years before applying;
- Have a clearly stated purpose and function within the voluntary human and social services sector in Burlington and Hamilton;
- Demonstrate that there is a need for a separate United Way funded agency which can effectively meet identified needs not currently being met by other agencies;
- Be governed by an active volunteer Board of Directors whose membership reflects the community it serves and is responsible for the agency's strategic plan and ensuring effective and efficient management of the agency's program and budgets. The Board will have specified plans for both recruitment and rotation of its membership. Membership of the Board of Directors will not include staff of UWB&GH, nor persons appointed by or selected as official representatives from UWB&GH;
- Have a local volunteer advisory committee that oversees the agency, if the agency is part of a national, provincial or regional agency;
- Have a voting membership which reflects the community it serves. Individual voting members must be at least 18 years of age as required by the Corporations Act;

- Effectively utilize volunteers in the delivery of services, where appropriate; Appropriately manage risk related to the use of volunteers at the agency, including carrying the appropriate level of insurance;
- Have a realistic budget and produce annual audited financial statements*;
- Conform with the Ontario Human Rights Code and not exclude anyone from service, accommodation or employment by reason of race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, gender, sexual orientation, age, marital status, family status or disability;
- Be supportive of UWB&GH's mission and policies;
- Use outcome measurement/evaluation as part of its program planning and evaluation;
- Provide programs that work within one of the funding priorities of UWB&GH. The agency must demonstrate how it fits with the criteria area(s) and contributes to the result within the funding priority most closely aligned to its program(s).

* An agency incorporated in Ontario with an annual income of less than \$100,000 is exempt from providing annual audited financial statements. It must however, produce annual financial statements that have been subjected to a Review Engagement.

Funding Agreement & Expectations

In addition to meeting UWB&GH's eligibility criteria, all agencies must comply with the Funding Agreement and Operational Policies. Highlights are noted below:

- Invest all United Way dollars paid to the agency in support of approved program(s) operating budget only. Participate in an evaluation of its governance, management, program and financial requirements on a regular basis as established by United Way.
- Make available program, service, statistical and financial reports as required by United Way.
- Advise United Way immediately of any significant organizational and program changes that affect programs supported by the United Way.
- Prominently display an identifying plaque or sign at or near the entrance of its premises with the United Way logo and/or the words "United Way Agency", unless detrimental to the well-being of the agency's clients.
- Use the United Way logo and/or the words "United Way Agency" on all printed and web-based materials (including letterhead, agency newsletters, promotional folders, brochures and flyers, direct mail solicitation and promotional efforts, news releases, annual reports, income tax receipts, home page of the agency's website, and all print or broadcast media publicity).
- Adhere to United Way policies discouraging self-designations and the promotion of donor designations to funded Agencies.
- Participate actively in promoting the success of United Way's fundraising activities and encourage and enlist the participation of its constituency and members in such activities.

- Refrain from fundraising during the United Way's Campaign period of September 1 to November 30 in accordance with United Way's Fundraising Policy.
- Abide by the funding conditions set by United Way, if applicable, and to work towards the fulfilment of listed funding conditions.

Outcome Evaluation/Measurement

- **What Is Outcome Evaluation/Measurement?**
Outcome Measurement (OEM) is an integral component of UWBGH funding and a beneficial management tool to help agencies demonstrate the impact on the clients they
- **Why Outcome Evaluation/Measurement?**
An OEM system will demonstrate the results of the program. The process identifies areas needing improvement and gaps in service. This ensures maximum effectiveness in serving the community.
- **What Does Outcome/Evaluation/Measurement Involve?**
An OEM model highlights short, intermediate and long term impacts by identifying the following pieces of information:
 - Outcomes - The benefits or changes on clients that the agency expects as a result of a program.
 - Indicators - Measurable information that tracks the achievement or success of an outcome.
 - Data Collection Methods - The tools used to track information and gather evaluation information necessary to achieve the desired indicator(s).
 - Outcome Findings - Compiled information demonstrating the benefits or changes as a result of a program.

Examples of Outcome Findings

- 71% of clients reported improved quality of life
- 92% of clients report they are able to make healthier choices
- 100% of children made improvements in social skills
- 71% of clients reported a significant reduction in their drug use

Application Process & Timelines

- September, Funding Application Progress Report: Agencies are provided with an Application Package or Progress Report Package and are invited to complete a funding application or progress report
- November, Submission of Funding Application or Progress Report: The funding application addresses the following areas: Organizational Capacity, Governance, Financial Management; Detailed Program Information, Outcome Measurement & Program Specific Financials
- November - January, Citizens' Review

- Third Part Review - Outcome Measurement / Third Party Review - Financial Review
- February - March, Burlington Investment Linkages Committee, Hamilton Investment Linkages Committee: The I&LC is comprised of senior investment volunteers who review the individual Citizens Review Panel recommendations and report to the Community Impact Committee