Community Impact Grant Training - Volunteers

United Way Northern Shenandoah Valley

2025

GIVE. ADVOCATE. VOLUNTEER.

UNITED WAY
Northern Shenandoah Valley

Impact Grant Panel Volunteer Training Agenda

- ▶ Community Impact Grant Program Overview
- ▶ Grant Evaluation Process and Overview
- ▶ Program Outcome Model Overview
- ▶ What's Next?

The Problem

▶ Too many people in our region still struggle with basic needs including health care, education, and financial stability.

▶ Resources are often spread thin or don't go where they're needed most.

The Solution

▶ Use local data—including the Community Needs Assessment and ALICE Report—to guide funding decisions to:

    ▶ Focus on real needs that matter most to local people

    ▶ Invest in targeted programs aligned with our pillars: health, education, and financial stability

    ▶ Put resources where they can have the greatest impact

      This ensures our community investments

      lead to real, lasting change.

The Solution: United Way Community Impact Grants

▶ Impact Grants fund local nonprofits that are 501(c)(3) organizations or partner with an approved fiscal agent working in health, education, or financial stability.

▶ Grants are awarded for one year and must support a specific program or project, not general operations like rent or office supplies.

▶ Programs must demonstrate real, lasting results that we can share with the public.

▶ We want to know:

   ▶ What will this program actually do?

   ▶ How will it truly improve lives in our community?

In 2024, United Way NSV awarded $400,000 in grants to 36 local agencies.

United Way Pillars and Objectives

🖤 **Build Healthier Communities (Health)**

Objective: Help individuals live healthier, more independent lives with access to quality care and support.

📄 **Invest in Our Children (Education)**

Objective: Support children and youth in reaching their full potential through strong early learning and educational opportunities.

💲 **Create Economic Opportunity for All (Income/Financial Stability)**

Objective: Help families become self-sufficient and financially stable by increasing access to jobs, skills, and resources.

Community Impact Grant Eligibility

▶ **To be eligible for a Community Impact Grant, an organization must:**

  ▶ Be a 501(c)(3) nonprofit and a registered charity in Virginia – or be working with an approved fiscal agent

  ▶ Be led by a volunteer board and have a clear structure for running programs

  ▶ Follow Generally Accepted Standard Accounting practices (GAAP) and complete all required financial reviews and documentation

  ▶ Provide health or human services in one of these areas: Winchester City, Frederick, Clarke, Warren, Shenandoah, or Page Counties

  ▶ Agree to use funds in accordance with all applicable laws, including anti-terrorism and asset control laws

  ▶ Be able to submit all post-grant reports on time.

✓ **Grant Readiness Requirement:** The organization must **demonstrate the ability to handle financial responsibilities** and show they have the **staff and systems in place to manage the grant successfully**.

Required Documents

1. A completed United Way Impact Grant application with program budget either included or attached.
2. IRS determination letter – 501(c)(3).
3. Proof of Registration with Virginia Department of Agriculture and Consumer Services (VDACS) (determination letter, online search result showing valid registration or exemption from annual registration)
4. IRS Form 990, 990EZ or 990N (based on organization size and requirement).
5. Current Annual Report (including list of Board Members).
6. Copy of most current financial report (statement of activities/operating budget).
7. Completed Patriot Act Compliance Memo (provided by UWNSV)
8. Verification-agency has local presence in the UW catchment area.
9. 25 word description of the organization and the health and human care services.
10. Financial Due Diligence (**one of the following is required** based on criteria in the chart below):
    a. Receipts for Allowable Expenditures
    b. Financial Compilation
    c. Financial Review
    d. Finance Audit
11. Quarterly grant reports *post grant award* detailing grant inputs, activities, outputs, outcomes, and spending. Subsequent quarterly payments will be contingent on receipt of the quarterly report from the prior quarter.

Financial Due Diligence requirements are based on *organization size* and *award size*.

Examples of Goals

Goals

Access to Care: All households have easy to access and ample, affordable, high quality, preventative, immediate and follow-up health and dental care.

Trauma Informed Care: Households have access to the necessary supports to address the negative effects of Adverse Childhood Experiences (ACEs), violence and physical hazards; communities support people's health, safety, and development.

Behavioral Health: Households will demonstrate improved behavioral health by reporting better mental health and a reduction in substance abuse, and reduced stigma that is a barrier to care.

HEALTH

Goals

Basic Needs: Children have access to basic needs

EDUCATION

Early Learning: Preschool aged children have access to affordable, high quality, early learning programs that prepare them for kindergarten.

Youth Support Programs: Students have access to high quality, enriching out of school programs where students have support and encouragement from engaged parents, advocates and mentors.

Goals

Basic Needs: Support our most vulnerable neighbors by providing them access to basic needs supports.

Housing: Families have access to a continuum of housing solutions that provide safe, decent and affordable housing options.

Employment: Identify & remove the gaps and barriers that currently exist for individuals to enter the workforce and attain and retain family sustaining employment.

Financial Stability: Create opportunities for families to move from financial instability to financial stability.

FINANCIAL STABILITY

Grant Review Process – What to Expect

➤ Review panelists receive an invitation to access and review grant applications.

➤ Panel Chair schedules agency site visits (some by Zoom) and panel presentations.

  ➤ In 2025 these will take place concurrently.

➤ Panelists complete a rubric assessment for each application based on the provided criteria.

➤ Attend visits to hear directly from applying agencies.

➤ Join group discussions to review scores and make funding decisions together.

➤ Panel Chair presents final recommendations to the United Way Board.

➤ Award notifications go out in June.

Impact Grant Evaluation Criteria

1. Application (including all required documents)
2. Site visit (or Zoom Visit) & presentation
3. Alignment with United Way priority needs
4. Collaboration with other organizations
5. Program Impact & Program Outcomes
6. Budget – use of funds
7. Metrics

Impact Grant Scoring Rubric

Criteria Areas	Scoring Criteria	Total Possible Points
Application Narrative	Application provides clear understanding of program services, activities, outcomes and measurable results	10
Collaboration	Collaboration demonstrates sharing of resources.	5
	Collaboration demonstrates sharing of responsibility.	5
Program Impact	Program clearly explains plans to address root cause.	5
	Program outcome data predicts clear results and will operate during the funding period.	10
	Program demonstrates that it will make a sustainable and measurable impact on community needs and clearly aligns with United Way NSV priority funding objectives.	15

Outcomes	Outcome data directly related to the program and is collected by the agency.	10
	Agency has a plan to measure results consistently across all aspects of the program.	5
	Initial, intermediate and longer term outcomes are clearly defined.	10
Budget	Budget demonstrates responsible use of funds, generation of resources and supports the desired results.	5
Agency Visit	Overall impression of agency operation and details of the grant proposal.	10
Agency Presentation	Clear understanding of program and measurable outcomes.	10
		TOTAL:
		Recommended Grant Amount:

Financial Due Diligence

- **All organizations applying for United Way Impact Grants go through an internal financial review.**
  - This process ensures that each nonprofit is financially stable and accountable.
  - United Way staff handle this review behind the scenes.

✓ **Each grant application includes a summary sheet with:**

- Key financial information
- Verification of required documents
- Notes from the vetting process

Financial Due Diligence Reviewers Role

▶ Because the financial vetting is already done, **volunteer reviewers can focus on what matters most:**

- ▶ The strength of the **program**

- ▶ Its **impact on the community**

- ▶ How well it aligns with United Way's pillars: **Health, Education, and Financial Stability**

Program Outcome Model Overview

▶ United Way wants to fund programs that:

  ▶ **Deliver real change (outcomes)**

  ▶ **Can show clear, measurable results (indicators)**

▶ When reviewing grants, the panel looks for both:
✓ *What the program is trying to achieve*
✓ *How the program will track and report success back to the community*

Program Outcome Model Measurement

"So What?"

▶ What are the outcomes/benefits to the client?

"How do you know?"

▶ What are the indicators used to measure your results?

Program Outcome Model - Outcomes

☑ **Outcomes – *The "What Changed?" or "So What?"***

▶ Outcomes are the **positive results** or changes that happen because of a program.

  ▶ They answer the question:
  "How did this program make a real difference in people's lives?"

▶ Examples:

  ▶ A teen mentorship program helps more students graduate high school

  ▶ A food access program leads to better nutrition for seniors

  ▶ A financial literacy course results in more participants starting a savings plan

  ▶ Think of outcomes as the **goalposts**—what success looks like.

Program Outcome Model - Indicators

📈 **Indicators –** *The "How Do We Know?"*

▶ Indicators are **specific metrics** that show progress toward an outcome; often this can be seen through examples of past success.

   ▶ They answer the question:
   "How can we tell that change is happening?"

▶ Examples:

   ▶ 85% of students improved their reading scores

   ▶ 50 seniors report eating more fresh fruits/vegetables weekly

   ▶ 40 families created a household budget for the first time)

▶ Indicators are the **proof points**—how we track and measure progress.

Measurement/Indicators (examples)

Service: Quality Early Childhood Education

Outcome: Children enter school ready to learn

Indicator: Last year the PALS Assessment showed an 85% improvement in Kindergarten reading

Service: Financial Literacy

Outcome: Individual is able to create and follow budget

Indicator: Last year 40 individuals who completed training and were able to maintain a household budget for 3 months after training.

Questions?

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THANK YOU!

United Way Northern Shenandoah Valley

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