

September 19, 2022

Dear Program Representative:

Enclosed you will find Head of the Lakes United Way's (HLUW) 2023-2024 Community Investment application for funding for all grant amounts. This year's application review will determine your program allocation for 2023. In the second year of the funding cycle, no application is necessary as your 2023 allocation will typically be based on the first year allocation pending board approval and adjustments made according to the fundraising campaign results. This application should reflect your needs for a one-year timeframe of the two-year funding cycle.

United Way Community Investment Calendar

September 19, 2022	Application Available
November 18, 2022	Application Due
January/February 2023	Presentations to Community Investment Review Panels
March 2023	Head of the Lakes Board Meeting- Allocation Approval
April 2023	Agency Agreements Due
May 2023	First Allocation Disbursement

Submission Process

- All applications are due by 4:30PM on **November 18, 2022**.
- Applications must be submitted both electronically and in hard copy.
- Send one (1) completed application electronically to: epawlik@hlunitedway.org
- Send twelve (12) hard copies for each program request (collated, double-sided, three hole punched, paper clipped ,no staples) to:

Head of the Lakes United Way
Attn: Liz Pawlik
424 West Superior Street, Suite 402
Duluth,MN 55802

For questions please contact: Liz Pawlik at 218-590-0408 or epawlik@hlunitedway.org.

Kind Regards,

Matt Hunter, President

Liz Pawlik, Community Impact Director



BASIC ELIGIBILITY REQUIREMENTS

- Agency location within the HLUW's Geographic Service Area:
 - Ashland and Bayfield WI Counties
 - Greater Duluth, MN (cities of Duluth, Hermantown and Proctor)
 - North Shore (Lake and Cook MN Counties)
 - Superior, WI-Douglas County Area
- At least .5 FTE paid staff located in HLUW's service area (as defined above)
- Inclusion of at least one Board member residing in HLUW's service area (as defined above)
- IRS tax-exempt designation of 501(c) 3 or invited public entity
- Agency mission is consistent with HLUW funding priorities of either Health, Education or Financial Stability (see page 4)

FINANCIAL REVIEW CHECKLIST

Please Submit:

- one (1) electronic copy to: epawlik@hlunitedway.org
- one (1) hard copy of financial information

<input type="checkbox"/>	Most recent audited Financial Statement, including opinion and management letters. (Agencies are required to provide an audit when revenues exceed \$750,000 in Minnesota or \$500,000 in Wisconsin. Agencies with revenue below those limits should provide a Review prepared by an independent Certified Public Accountant.)
<input type="checkbox"/>	IRS Form-990 (for organizations with budgets of \$25,000 and more)
<input type="checkbox"/>	Financial statement of actual income & expense for the most recently completed fiscal year & year-to-date for the current fiscal year. (If your most recent fiscal year is included in audit, only provide this info for the current year-to-date)
<input type="checkbox"/>	Organization budget for prior and current fiscal year, including income and expenses, using your agency's existing budget format
<input type="checkbox"/>	Program budget for prior and current fiscal year, including income and expenses, using your agency's existing budget format.
<input type="checkbox"/>	Copy of your current IRS determination letter (or fiscal agent's) indicating 501(c)(3) status
<input type="checkbox"/>	List of board members and their affiliations

PROGRAM INFORMATION

Program Name:	
Organization Name:	
Contact Person & Title:	
Telephone Number:	
Email:	
Mailing Address Line 1:	
Mailing Address Line 2:	
City, State & Zip:	

Amount Requested: \$

Geographic Area Served:

- GREATER DULUTH NORTH SHORE
 SUPERIOR/DOUGLAS COUNTY ASHLAND/BAYFIELD

Primary Focus Area (choose one and see descriptions below):

- HEALTH EDUCATION FINANCIAL STABILITY

Organization's Mission Statement:

Program Description:

Please give a 2-3 sentence summary of the proposed outcomes of grant:

HLUW IMPACT & FUNDING AREAS

Please note that the examples listed under the impact areas are not a comprehensive list. Please reach out to HLUW staff if you have any questions about these areas.

HEALTH: By making it easier for individuals to access substance abuse programs, receive quality health care and access nutritious foods, we're striving to help everyone get—and stay—healthy.

- Access to affordable healthcare, dental, mental health services and medication
- Health, mental health, and wellness programs and services
- Substance abuse programs
- Resources for those with disabilities and chronic health issues
- Food assistance and nutrition education
- Services to help elders live independently
- Services for victims of violence

EDUCATION: We're striving to shift the odds so tomorrow's leaders can build a better foundation today. With an approach to education that spans from cradle to career, we're ensuring every child gets a strong start in life, teenagers have the tools to learn and grow, and young adults thrive in the job market.

- Development and enrichment programs
- Interventions for at-risk youth
- Youth-specific health, mental health, and wellness programs and services
- Services to strengthen families
- School readiness and early childhood education
- Anti-bullying programs

FINANCIAL STABILITY: We're striving to put every person, in every community, on a path toward financial empowerment. That starts with access to housing, job training, credit counseling and money management programs.

- Emergency Financial Assistance
- Financial education and counseling
- Vocational and Jobs programs
- Housing programs
- Shelter and support

COMMUNITY IMPACT

1. Describe how this program contributes to advancing the selected impact area (health, education or financial stability) and how it meets current community needs? Please use any published data or community assessment reports to support your answer and cite all sources.

PROGRAM OUTCOMES & MEASUREMENT

2. This section demonstrates how your program results in specific measurable outcomes that contribute to advancing the selected impact area (health, education or financial stability) based on your cited current community needs. Program outcomes relate to a community need that the program intends to address and are stated in measurable terms with emphasis on what the client will gain through this program or service.

PROGRAM OUTCOMES	ACTIVITIES TO MEET PROGRAM OUTCOMES	HOW WILL YOU MEASURE IF OUTCOMES ARE MET?

PROGRAM REACH/DEMOGRAPHICS

3. Please provide the number of people served by this program in 2021 and an estimated number or goal for future years.

4. What are the demographics of the population you serve? Please include as much detail as possible including; Race, Ethnicity, Gender, Age, Sexual Orientation, and Disability.

PROGRAM BUDGET

Please provide the following information for the specific program or service described in this application. Please be sure to include all requested information under the Financial Review Checklist (page 2).

5. List support (with amounts) from other funders, foundations, and governmental agencies:

6. What is the estimated annual cost of this program per participant? \$
Please explain the factors used to calculate this estimate.

PROGRAM ACCOUNTABILITY

7. Program Staffing: Describe how staff, board, and volunteers play a role in your organization's delivery of services. Estimate the total number of FTEs, active volunteers, and board members dedicated to this program

8. Program exclusivity: How is your program unique amongst others providing the same or similar service?

DIVERSITY, EQUITY & INCLUSION (DEI)

9. Please explain the work you are doing to advance equity within our community. If no activity, what support do you need to increase your capacity and or awareness around DEI?

CHALLENGES/OPPORTUNITIES FOR IMPROVEMENT

10. What are the program's biggest challenges? And how do you plan to overcome those challenges?

TELL YOUR IMPACT STORY

- 11.** Give a specific example of how this program benefits individuals or families. Use fictional name(s), but give a specific and recent example. This may be used in United Way promotional materials. Please include any photos if available, along with a photo release form.