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## **Introduction**

United Way Perth-Huron strives to create real, lasting change to improve the quality of life in our communities. United Way identifies, understands and addresses the root causes of social issues; brings together research, experts and resources; initiates and invests in effective programs and services; and builds capacity in the non-profit sector.

We believe the root of all action for change is the ability to see and feel ourselves in the situations of others. We believe all people and all communities have the potential to overcome challenges. We treat people with dignity, fairness and equality. We make decisions based on the needs and expectations of our community and we believe it is imperative to measure and communicate our impact.

Our community impact strategy is guided by our organization's vision, mission and values and has been developed with input from our community, supported partners, donors and volunteers. This strategy builds on previous community impact strategies including United Way Perth-Huron's Planning for Community Impact: Focus Area Framework (2014) and United Way Centraide Canada National Focus Area Frameworks (2014).

## **Our Vision**

A better life for everyone in our communities.

## **Our Mission**

Improve lives and build community by engaging individuals and mobilizing collective action.

## **Our Core Values**

- Demonstrate trust, integrity, respect, inclusivity, and transparency;
- Energize and inspire volunteerism and volunteer leadership;
- Endorse innovation, partnerships and collective action;
- Provide non-partisan leadership and,
- Embrace diversity.

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## **Community Impact**

Together with our partners, United Way Perth-Huron is committed to social change in our community by leading evidence based activities and initiatives that employ the following community impact strategies:

### **Ignite**

Ignite awareness and understanding of the root causes of our community's social challenges to inform social planning and collaboration through:

- Storytelling • Data analysis • Research • Evaluation • Outcome measurement

### **Inspire**

Inspire contributions of dollars, influence, time and knowledge to social change in our community by:

- Individuals • Donors • Corporate partners • Community organizations

### **Influence**

Influence systems and policies through advocacy and by strengthening relationships with:

- Governments • Corporate partners • Community organizations • Community networks

### **Invest**

Invest resources, including dollars, time and knowledge, in programs, services and community convening to:

- **Address root causes** • Strengthen social service networks • Increase community capacity

### **Our Community Impact Areas (Priorities)**

United Way Perth-Huron focuses on three impact areas that create opportunities for everyone in our communities to live a better life:

#### **From poverty to possibility**

Meet basic human needs and support people in moving out of poverty by prioritizing:

##### **Basic needs**

Provide basic needs for all individuals and families including access to emergency food provisions, health needs, baby food and supplies, clothing and transportation.

- Includes (but is not limited to): emergency shelter, health needs, clothing, food provision (meal delivery, community meals, food distribution programs) and transportation.

##### **Housing stability**

Ensure people who are homeless or at risk of homelessness find, obtain and maintain local housing using a Housing First approach.

- Includes (but is not limited to): affordable, safe, permanent housing with the right level of support and house finding supports.

##### **Income stability**

Enhance job readiness, support individuals to find and maintain employment and support individuals requiring social assistance.

- Includes (but is not limited to): living wage advocacy, pre-job guidance services, mentoring, financial literacy and soft skills training and development programs.

### **All that kids can be**

Help children and youth reach their full potential by prioritizing:

##### **Success in education**

Promote the educational achievement of children and youth, as well as their transition to post secondary education, training or employment.

- Includes (but is not limited to): services that support school readiness, counselling and alternative educational options.

##### **Community connection and emotional & physical wellbeing**

Provide opportunities for children and youth to develop positive social relationships with adults and peers, meaningfully participate in and contribute to our community and assist in the development of mental and physical health.

- Includes (but is not limited to): programs that address barriers to participation, mentoring programs, leadership programs, skill development programs, cultural programs, healthy activities and social activities.

### **A strong community with resilient & healthy people**

Support personal well-being and strengthen communities by prioritizing:

#### **Community mental health supports & services**

Promote mental health and well-being, reduce stigma, and provide community-based mental health programs in a timely manner to individuals and their family members and caregivers.

- Includes (but is not limited to): subsidized counselling, peer support, supports for family members and caregivers and social connection opportunities.

#### **Wellbeing & resilience for all**

Ensure everyone can access programs and services, has the opportunity to actively participate in their community, and can reach their full potential despite the ongoing legacy of deeply embedded social and structural inequities and discrimination.

- Includes (but is not limited to): culturally competent programs and services for Indigenous people, supports for adults and children with disabilities, healthy and active living programs for seniors, programs that reduce social isolation and loneliness for residents of rural communities and integration programs and services for newcomers.

#### **Addressing gender-based violence**

Assist individuals who have experienced sexual violence and/or abuse, as well as those who have experienced physical, and/or emotional abuse in domestic relationships.

- Includes (but is not limited to): counselling and transitional services, parenting supports, violence prevention programs, support for child and youth witnesses and counselling and support for men.

#### **Community & neighbourhood development**

Strengthen communities and neighbourhoods by engaging residents and community stakeholders to improve the quality of neighbourhood life and foster community connections; build and maintain an adequate network of individuals, organizations, supports and programs to ensure strong and vibrant communities.

- Includes (but is not limited to): resident engagement programs, skills training, advocacy, civic engagement and volunteer management.

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## **Community Investment**

### **Our Community Investment (Development) Process**



UWPH has established the above community investment and development process. This process helps to ensure continuous evaluation of UWPH’s investments to its mission and vision. Our process is circular because UWPH may become involved with a potential investment at any stage of this development process.

In this process, UWPH values critical input from:

**1. Partnerships and Front-Line Agencies**

While UWPH is a local social expert, our work is not front-line. Therefore, we need to rely on the expertise of front-line services.

**2. People with Lived Experience**

UWPH recognizes that individuals with lived experience (and/or current program participants) know what is best for themselves and their community, and that their participation is integral to the success of this process. UWPH will respectfully gain knowledge from those in our community with lived experience. UWPH wants to empower those with lived experience to have input into investments in programs that will be the most beneficial to those who need to use them.

**3. Community Collaborative**

UWPH will strive to be inclusive of diverse voices that may or may not have charitable status (see Funding Criteria section) but represent an equity-seeking group or vulnerable population in our region.

**4. Regional Community Committees**

UWPH values the local knowledge of Regional Community Committees (CC). Our CC’s are composed of local residents who see issues/trends that are impacting their community most. We rely on this knowledge to help make investments in these regions.

**5. Social Research & Planning Council (SRPC)**

The SRPC has expertise in research, planning, development and advocacy. We use this expertise to ensure that identified issues/trends are verified with current data.

**Our Investment Model**

**Prioritizing Poverty Mitigation**

UWPH's funding model prioritizes poverty reduction and prevention as a way to focus our work and impact in the community. UWPH defines the state of poverty as one in which income is too low to provide for an adequate standard of living. Poverty is about more than income and is also about exclusion from resources, opportunities, and connections.

UWPH will invest in poverty reduction and/or prevention initiatives that:

- serve people who are living in poverty and/or;
- serve people at risk of living in poverty and/or;
- lessen the effects of poverty and/or;
- prevent poverty and/or;
- reduce the incidence of poverty in our community and/or;
- address the root cause(s) of poverty.

### Prioritizing Equity-Seeking Groups & Vulnerable Populations

UWPH is also focussed on increasing funding opportunities to organizations and programs that serve equity-seeking groups and/or vulnerable populations who are disproportionately affected by social challenges in our region.

Poverty and other social challenges impact everyone, but some groups and communities are disproportionately impacted because of deeply embedded social and structural inequities. The ongoing legacy of systemic discrimination and racism continue to influence our current system of laws, our institutions, and our culture. As a result, many people in our communities are denied opportunities to reach their full potential. These populations are considered to be equity-seeking.

UWPH prioritizes investments into the following equity-seeking groups and vulnerable populations (in no specific order):

- People with low income or living in poverty including children and youth
- Indigenous peoples
- Racialized communities
- People experiencing homelessness
- Immigrants and refugees
- People who live in rural or remote communities
- Women and girls
- People experiencing intimate partner or gender-based violence
- People living with mental illness and/or addiction
- Persons with disabilities
- People who identify as 2SLGBTQ+ or non-binary

### Our Investments Streams

UWPH invests in a number of ways including:

#### Programs

UWPH has prioritized key community programs as part of UWPH operations. These include programs that are best operated by UWPH for our community, including:

- 211
- YOUthConnect
- KEYS
- SRPC

- iVolunteer Perth-Huron
- Community Renewal Company (CRC)
- Hubs

From time to time, UWPH may also budget for direct investments into key priorities (i.e. Living Wage Canada). In these circumstances, the Community Impact & Allocations Committee may not be required for approval.

### Support

As a social leader, UWPH is often called upon to support local committees, efforts. Based on fit with mission, capacity and priority, UWPH may offer support to such efforts.

### Funding

UWPH invests in program/initiatives operated by other organizations. These investments are prioritized using the Investment for Impact Policy (All13). UWPH's funding streams are:

#### Impact Funding (3 Year)

(see Impact Funding Policy – All\_ for further details)

Impact Funding is intended for ongoing programs that are part of the organization's overarching structure and mission. The intent of offering multi-year funding is to provide increased financial stability for applicants and a greater capacity to measure outcomes achieved. The multi-year funding model promotes sustainability of services for the community by allowing organizations to concentrate more on program design, delivery and evaluation. Additionally, multi-year funding encourages longer-term planning, evaluation of impact and efficiency for both organizations and UWPH. It may also enable organizations to better leverage their positions for additional funding elsewhere. Multi-year funding facilitates efficient and effective use of staff/volunteer/organization time during the allocation process and enables both organizations and UWPH to engage in longer-term planning and outcomes measurement.

#### Youth In Action Grants (1 Year)

(see Youth In Action Grants Policy – All\_ for further details)

Youth in Action (YIA) Grants are focused on youth-led projects that offer creative ideas to address community issues impacting youth in Perth County and/or Huron County. These funds support youth-led projects that positively benefit the participants' communities and support youth development.

#### New Initiative Grants (1 Year)

(see New Initiative Grants Policy – All9 for further details)

UWPH recognizes that encouraging new approaches and innovations in community services and programs are important. The New Initiative (NI) Grant funding stream was created to respond to:

- emerging needs
- test and evaluate new models of service
- support collaborative partnerships or smaller-scale projects
- assist in the pilot of new projects

#### Emergent/Emergency Need Grants

(see Emergent Emergency Need Grant Policy - All6 for further details)



The goal of UWPH's Emergent/Emergency Need Grants are to provide financing for emergent or time sensitive emergency needs.

### **Our Funding Criteria (for external organizations)**

As part of the Community Impact Funding model, UWPH gives everyone in our community an equal opportunity to submit funding requests.

Funding requests will be evaluated using the following criteria:

- Program provides service in Perth County and/or Huron County (Ontario, Canada).
- Program aligns to UWPH's Community Impact & Investment Plan
- Program reduces poverty in our community
- Program prevents poverty in our community
- Program prioritizes service to one or more equity-seeking populations
- Program addresses an urgent need facing our community
- Program is led by an organization that:
  - is sustainable, stable and strong
  - fulfills the expectations for Supported Partners (as detailed in the Investment for Impact Policy - All13)

At present, UWPH is limited by the Income Tax Act to only fund registered charities and qualified donees as defined by the [Canada Revenue Agency](#). However, if an applicant does not meet this criteria, they could receive funding from UWPH if they:

- a. enter into a formal sponsorship agreement with an organization that meets this criteria and other eligibility requirements; or,
- b. enter into an Agent Agreement with UWPH for non-qualified donees .

### **Ineligible Organizations**

United Way will not fund the following (ineligible organizations):

1. For-profit organizations
2. Funding bodies that reallocate UWPH funding to another organization
3. Foundations
4. Unions
5. Professional Associations
6. Government or government agencies, boards and/or commissions
7. Regulated health professionals (see listing at [http://www.health.gov.on.ca/en/pro/programs/hhrsd/about/regulated\\_professions.aspx](http://www.health.gov.on.ca/en/pro/programs/hhrsd/about/regulated_professions.aspx))
8. Hospitals and long-term-care facilities
9. Universities, colleges and school boards
10. Organizations whose purpose is solely related to political activity, as defined by the Canada Revenue Agency
11. Organizations without a clear demarcation between religious and community service
12. Organizations that could be deemed discriminatory, as defined by the Ontario Human Rights Code

An ineligible organization can apply for UWPH funding provided that:

- It is applying as a sponsoring agency for a collaborative project, and
- It is recognized by CRA as a Qualified Donee, and

- The funding requested is specifically for program expenses.

### Ineligible Programs/Services

The following types of programs/services are not eligible for funding from UWPH:

- Duplicate program(s)/service(s) in the same geographical area
- Loans or grant programs
- Government mandated programs/services (ex. services covered by OHIP, Child and Family Services Act, etc.)
- Licensed childcare programs
- Primarily cultural programs: *Many educational, recreational, and social programs include cultural events. This is not only acceptable, but also desirable. Programs excluded from UWPH allocations are those that are primarily cultural such as theatre, music, museum, or art programs.*
- Religious programs: *The exception is that funding of programs sponsored by religiously affiliated organizations may be considered provided that a written guarantee accompanies UWPH allocation request stating that the organization's programming is open, unbiased and accessible to all members of the community and that no religious education, no proselytizing, and no attempt at moral suasion will be undertaken as part of the program.*
- Medical research or procedures
- Some categories of health services: *In general, UWPH will only fund health programs that help maintain the ability of individuals to live independently and with dignity in the community, or programs that are aimed at improving overall community health. Such programs may involve educational, rehabilitation, or preventive programs that are not funded by the Canada Health Act. Programs dealing with acute medical problems are usually not funded.*
- Exclusionary programs: *UWPH will not fund programs that exclude individuals because of race, ethnic origin, religion, or sexual orientation. Programs specifically aimed at helping groups belonging to a specific race, ethnic origin, religion, or having a specific sexual orientation, will not be automatically excluded. Broadly based programs that are legitimately restrictive such as programs for seniors, youth, poverty, refugees, men's aggression control, and survivors of woman abuse are not excluded from funding.*

### Ineligible Costs

The following costs are not eligible for UWPH funding:

- Capital expenses
- Alcohol or drugs
- Gifts
- International travel
- Fraudulent activities

Exceptions to organization, program or cost eligibility criteria may be granted at the discretion of the Community Impact & Allocations Committee and approval by the Board.

### Evaluation of Funding Requests (for external organizations)

#### Roles

The Community Impact & Allocations Committee (CIAC) is a UWPH Board Committee. The committee is comprised of members of UWPH's Board as well as external community members. The CIAC's mandate is to:

1. Assist the Board in doing their work in investing in and connecting with the UWPH community.
2. Create and implement the Community Impact (CI) Plan based on quality community impact and allocation policies and procedures.
3. Review and evaluate all funding applications and other support requests, paying special attention to how each fits into UWPH's community impact framework.
4. Recommend allocation of resources considering policies, program eligibility and criteria for community impact to the Board of Directors.
5. To act as a liaison between UWPH's Supported Partners and the Board of Directors.
6. Engage regularly with the community and use outcomes to inform priority setting.
7. Ensure that the community impact outcomes are being accomplished through continuous impact measurement, program evaluation, and review of Supported Partner activities.

Staff members are non-voting members of CIAC and, as such, they research, provide information and point out issues and options to support informed decision-making. Staff will prepare the reports for CIAC that summarize discussion, recommendations and rationale.

### **Prioritizing Requests**

During the evaluation process for funding requests, a team of CIAC volunteers complete thorough and comprehensive reviews of all applicants requesting funding from UWPH. The process involves many hours of both independent and collective review of applications as well as discussions and analysis of applications requesting support from UWPH. In the end, the thoughtful funding decisions ensure UWPH supports organizations that are accountable, transparent and both fiscally and socially responsible.

Even though an applicant might meet or exceed expectations on every criterion, UWPH is not always in the position to meet all recognized needs. Once an organization is approved for and accepts funding from UWPH, it is subject to all UWPH policies and allocations procedures and must abide by the UWPH Supported Partner Agreement.

### **Measuring Impact of Investments**

Impact measurement continues to be a priority for United Way Perth-Huron.

- An evaluation framework, which includes clear and measurable outcomes and indicators, for each impact priority will be implemented to ensure the measurement of progress.
- At minimum, there will be annual reporting for all investments by UWPH. Normally Supported Partners are required to report at the end of each funding year on the progress of their program/project, the outcomes achieved, testimonial stories for campaign use, and will submit a financial statement for the year using a specific format provided by UWPH.
- UWPH and its Supported Partners measure the outcomes of programs/projects to:
  - Continuously improve – rethink, change, and adjust strategies, actions and investments
  - Provide evidence that change is occurring
  - Demonstrate and communicate the impacts of changes on individuals and communities
- CIAC may request a site visit or citizen review be completed for a Supported Partner to continue receiving funds. CIAC teams will be used for both the site visits and citizen reviews (see Supported Partner Site Visit, Citizen Review Policy for further details). However, the reason and

scope for the visits/reviews will vary. Each CIAC team will include at least one longer-term CIAC volunteer and staff(s) of UWPH, to add knowledge and history to the conversations.

#### **How We Communicate Investments**

UWPH will continually communicate investments to donors, partner and the public. Investments will be communicated with strategies included in the annual UWPH Communications Plan.