



United Way of
Waco-McLennan County
Local Giving. Local Impact.

2025-27 Grant Eligibility Information Session

October 28, 2024

About this Session:

- Session scope: United Way Basics & Eligibility 2025-27
- Slides, Recording & FAQs posted on website following session

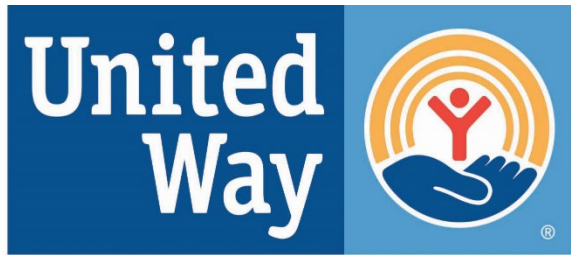
Technical aspects:

- Mute your microphone at start
- Please use the chat for questions
- For remaining Qs: grants@unitedwaywaco.org

Today we will cover:

- What is United Way?
- Funding priority areas - “Impact Framework”
- Grant Cycle Overview
- Grant Eligibility Criteria 2025-27
- Grant Process Timeline
- Eligibility Checklist & Grant Portal Demo
- Technical Assistance & Next Steps

ABOUT US



**United Way of
Waco-McLennan County**

Local Giving. Local Impact.

MISSION: United Way of Waco-McLennan County strengthens the community by mobilizing resources to measurably improve lives.

VISION: United Way of Waco-McLennan County envisions a community where all people have the education, health, and financial stability needed to achieve their full potential.

Convener – Collaborator - Funder

WHAT WE DO

We exist to be a bridge between the for-profit community and non-profit community.

We do this by:

- Creating opportunities for local companies and individuals to do their part in uplifting our community
- Investing dollars raised locally into local non-profit programs serving McLennan County residents in need
 - Collaborating with social service agencies to ensure every person in our community gets the resources they need

AREAS OF IMPACT



Health



Education



Financial Stability



Safety Net Services

OUR IMPACT FRAMEWORK

CHILDREN

OVERALL GOAL: Ensure access to high-quality childcare and educational opportunities.

Goal 1: Childhood Success

Quality Early Learning Environments

Ensure children ages 0-5 are receiving quality childcare

Promote the inclusion of multi-lingual communication in childcare centers and schools to encourage language achievement in young children

Provide non-traditional childcare options

Kindergarten Readiness

Ensure children enter school kindergarten-ready

Goal 2: Youth Success

Education & Extracurricular Activities

Ensure equitable access to educational and extracurricular opportunities for kids across all communities



FAMILIES

OVERALL GOAL: Meet the basic needs of children and families.

Goal 1: Healthcare

Equity in Healthcare

Address disparate treatment of people of color and women in healthcare systems

Increase awareness and availability of healthcare services and education reaching underserved communities regardless of their health insurance or citizenship status

Equity in Mental Healthcare

Expand availability of local mental health services and education reaching underserved communities

Goal 2: Women's Health

Women's Health

Expand availability of health services and education reaching women

Ensure women are receiving early prenatal care

Goal 3: Nutrition & Physical Activity

Nutrition

Ensure access to healthy foods throughout community spaces, including schools and childcare centers

Physical Activity

Expand opportunities for physical activity across communities in the county

Goal 4: Workforce Development & Financial Stability

Financial Resiliency

Increase the number of individuals receiving financial education and accessing no-cost resources to conduct financial transactions

Workforce Development & Education

Provide resources that allow individuals to participate in adult education, job skills training courses, and access job opportunities upon completion

Implement job skills training for high school students

Goal 5: Family Support & Education

Parent/Caregiver Support

Provide supportive classes and groups for caregivers of children

School Connection

Increase the number of families that are meaningfully connected to their child's school and its resources on an ongoing basis



COMMUNITIES

OVERALL GOAL: Increase access to community resources.

Goal 1: Access to Resources

Spanish Resources

Provide local resources (staff, programs, information) in Spanish throughout community services

Goal 2: Safety Net Services

Safety Net Services

Support essential services and emergency interventions needed for:

- Food, clothing, and housing assistance
- Medical assistance
- Trauma care and prevention
- Legal services

Goal 3: Neighborhoods & Community Housing

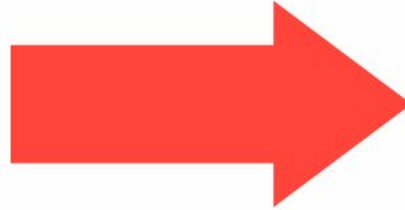
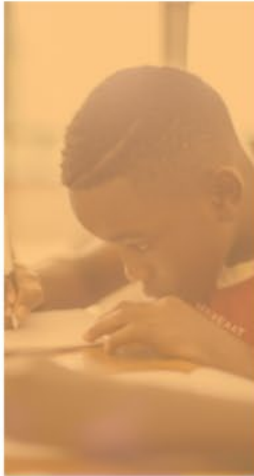
Strong Neighborhoods

Invest in neighborhoods in such a way that preserves culture, does not displace families, and brings amenities that are helpful to existing residents



ARE THE CHILDREN WELL?

A Report on the Movement to Support the Well-being of McLennan County Children and Families



MCLENNAN COUNTY CHILD WELL-BEING COMMUNITY ACTION PLAN

An initiative by



The McLennan County
CHILD WELL-BEING MOVEMENT

The Updated Framework



United Way of
Waco-McLennan County

- Effort to align our grant-making with community-identified priorities in the Child Well-being Movement's Community Action Plan
 - Alignment between UWWMC's strategic goals in Impact and Community Engagement
- How does this affect program Eligibility?
 - Restructured through the lens of Children, Families, Communities, however many of the goals/objectives from the original framework remain, with the addition of some new goals & strategies from the CWB Community Action Plan
 - Alignment still with health, education, financial stability and safety net services programming
 - We're continuing to fund programs that support children *and* their families, not just children (Child Well-being Movement is built on a Whole Child / Cross-Sector approach)

Impact Framework

Three Pillars

- Children
- Families
- Communities

Children:

Ensure access to high-quality childcare and educational opportunities.

Children

Goal 1: Childhood Success

- Quality Early Learning Environments
- Kindergarten-readiness

Goal 2: Youth Success

- Education & Extracurricular Activities

Families:

Meet the basic needs of children and families.

Families

Goal 1: Healthcare

- Equity in Healthcare
- Equity in Mental Healthcare

Goal 2: Women's Health

- Women's Health

Goal 3: Nutrition & Physical Activity

- Nutrition
- Physical Activity

Goal 4: Workforce Development & Financial Stability

- Financial Resiliency
- Workforce Development & Education

Goal 5: Family Support & Education

- Parent/Caregiver Support
- School Connection

Communities

Increase access to community resources.

Communities

Goal 1: Access to Resources

- Spanish Resources

Goal 2: Safety Net Services

- Food, Clothing, Housing Assistance
- Medical Assistance
- Trauma Care & Prevention
- Legal Services

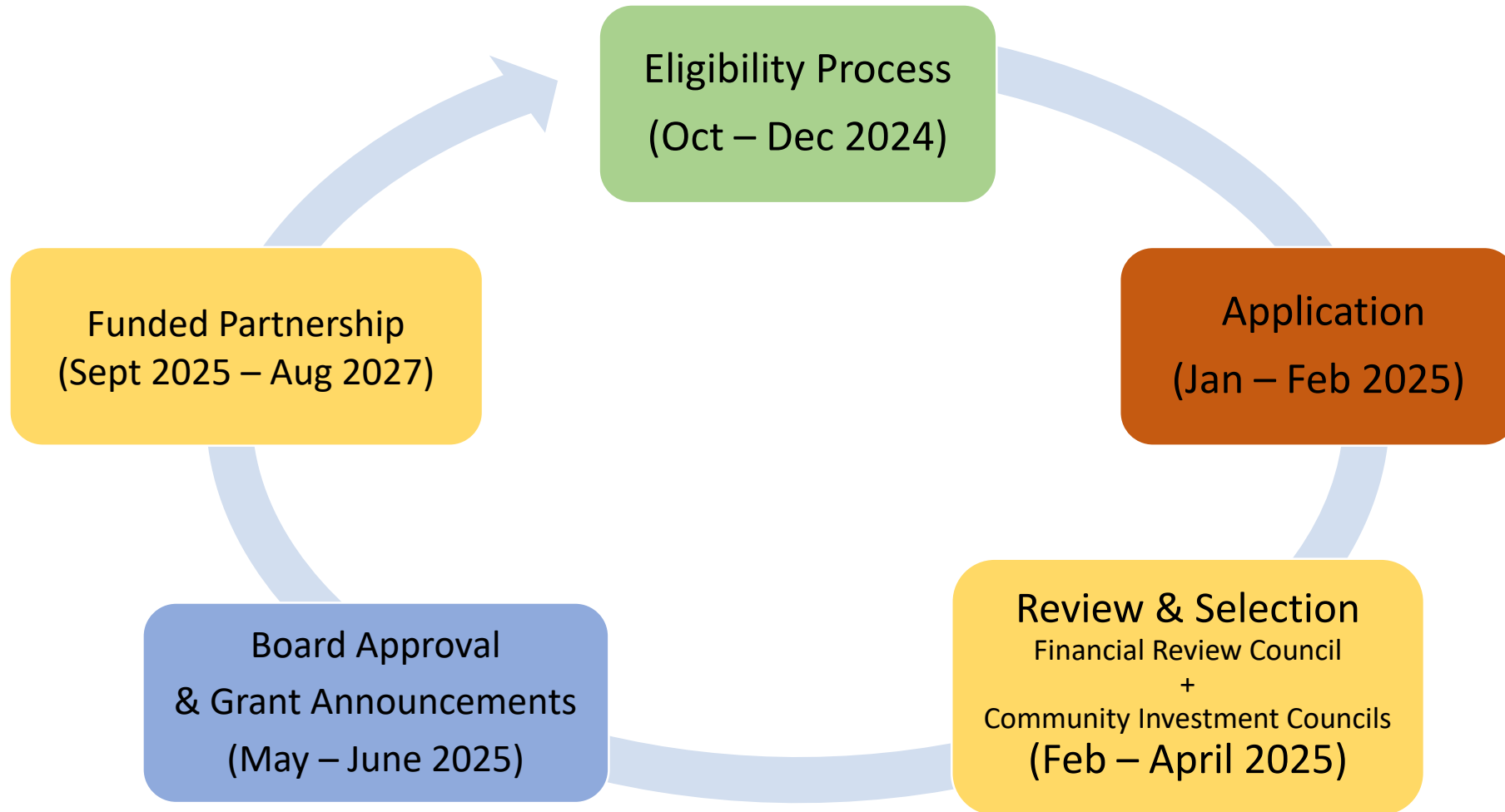
Goal 3: Neighborhoods & Community Housing

- Strong Neighborhoods

Grant Cycle Overview 2025-27



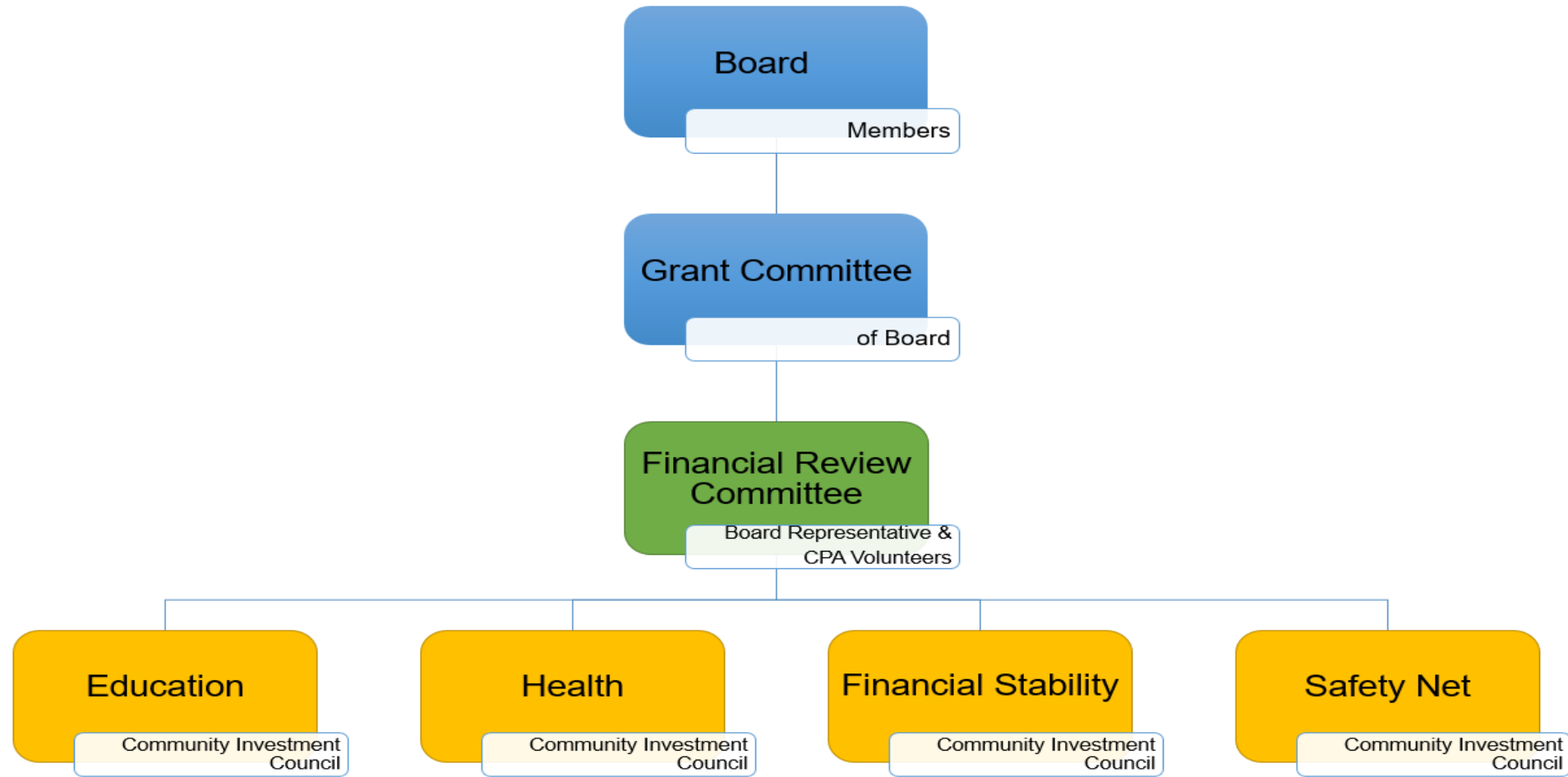
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Grant-making Structure



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Funded Partnership Commitments



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- Funded Partner Onboarding & Orientation – Aug 2025
- Events, Trainings, Convenings
- Semi-Annual Reports (every 6 months – 4 total)
 - Budget: Effective use of Resources
 - Data: Measureable and Meaningful Results (Impact)
 - Program Narratives: Successes/Challenges, Equity Goals updates & Client Success Stories
- Site Visit
- Other optional opportunities to engage with United Way

Grant Eligibility Criteria 2025-27

Eligibility Checklist

1. First Phase in Application Process

- Checklist Format – Organizational & Program Questions
- Document Uploads

2. Basic Eligibility Criteria Areas:

- Organization
- Program Alignment (United Way Impact Framework)
- Board
- Documentation verification

Organizational Criteria

Basic Eligibility Requirements:

- 501(c)3 Organization, except:
 - ISDs and ISD Foundations
 - Universities, Colleges and their Foundations
- UW Funding Request = 50% or less of total organizational budget
- McLennan County Service area
- Mission Statement

Program Criteria



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Basic Eligibility Requirements:

- Program/Activities Description
- United Way Impact Framework Pillar/Goal/Strategy Alignment

Board Criteria

Basic Eligibility Requirements:

- Formal Board Structure
- Board Tenure Limits & Rotation Plan
- Fiscal Responsibility of Board (Budget & Review)
- Annual Review of ED/CEO
- Organizational / Board Bylaws
- Meets 4x/ year + at quorum

Documentation



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Waco-McLennan County

Basic Eligibility Requirements:

- IRS - 501(c) 3 Letter*
- Audit or Reviewed Financial Statements (by \$ size bracket of organization – see next page)*
- IRS 990*
- Board of Directors List
- Certificate of General Liability Insurance
- Organizational/Board Bylaws
- Policy of Non-Discrimination of Services to Clients (or serving a Traditionally Underserved Target Population)
- Organizational Budget (*Current FY, budget-to-actual*)

***Required Upload for Eligibility Checklist Package**

All other documents subject to United Way request at any time. Must indicate that your org has all of the required documents on file.

Required Financial Documents By Org \$ Size

Financial Statements (min level)	<i>Org Annual Revenue</i>
<ul style="list-style-type: none"> <i>Audit</i> 	\$1,000,000 +
<ul style="list-style-type: none"> <i>Independent Financial Review (CPA/Accounting Firm)</i> <i>If not included in CPA/Firm's review, <u>please also attach</u> a Board Statement detailing:</i> <ul style="list-style-type: none"> <i>Internal controls in place at the organization, particularly to monitor cash</i> <i>The process for monitoring financial statements and budget for organization</i> <i>If any CPAs currently serve on the Board</i> 	\$500,000 - \$999,000
<ul style="list-style-type: none"> <i>Board-Approved Financial Statements</i> <i>(Prior FY Balance Sheet & Income Statement minimum)</i> <i><u>Include Board Narrative / Minutes approving annual financials and detailing:</u></i> <ul style="list-style-type: none"> <i>Internal controls in place at the organization, particularly to monitor cash</i> <i>The process for monitoring financial statements and budget for organization</i> <i>If any CPAs currently serve on the Board</i> 	\$499,999 and below

Grants – General Parameters

Question	Answer
Total United Way \$ available for all Grants?	<i>(Campaign Contingent)</i>
What is the funding cycle length?	<i>2 Years (24 months)</i>
Are grants renewable?	No, but may re-apply in following cycle; competitive process
What is reporting cycle?	Every 6 months (4 reports total)
How many program submissions are allowed?	Up to 2 programs

Grants – General Parameters



United Way of
Waco-McLennan County

Question	Answer
What is not funded?	<ul style="list-style-type: none">• Capital Campaigns• Debt Service• Endowments• Fundraising Events• Programs not aligned with Impact Framework• No significant building renovations• No Large Capital Purchases (e.g. vehicles) (maximum 10% of grant award, up to a maximum \$7,500 per organization)• New “seed” program of <u>new</u> organization (no history)• Short-term initiatives < 1 year• Materials or training only

Grant Amount Parameters

Question	Answer
Max request & award \$ per Organization?	<p>\$150K max Combined Total per Organization</p> <p><i>Exception: \$100K max for Organizations submitting programs under Safety Net Services goal area <u>only</u> (1 or 2 programs)</i></p>
Max request & award \$ per Program?	<p>There is no program grant request/award maximum</p>
Min request & award \$ per Organization?	<p>\$25,000</p>
Can a portion be for General Operating?	<p>Yes – up to 25% of grant</p>
United Way Program \$ request amount:	<p>Must be 50% or less of total Program Budget</p>
United Way total Org \$ request amount:	<p>Must be 50% or less of total Organizational Budget</p>

Grant Process Timeline



United Way of
Waco-McLennan County

2024	
October 28 (Mon) 2pm (Zoom)	New Agency Grant Eligibility Info Session
October 28 (Mon)	Eligibility Checklist/Intent to Apply Form opens
November 18 (Mon)	Eligibility Checklist/Intent to Apply Form closes
Early-Mid December	Invitations to Apply + Notifications of Grant Writer Assistance Receipt
2025	
Early January	Application Training
January – February	Grant Application open
March – April	Community Investment Council/Financial Review Council Grant Application Review & Funding Recommendations
May	Impact & Engagement Committee & United Way Board Review & Approval of CIC/FRC Funding Recommendations
June	Grant Award Notifications
August	Funded Partner Onboarding
September 1	Start of 2025-27 Grant Cycle

Eligibility Checklist Demo

Grant Portal Overview

- Must email grants@unitedwaywaco.org to request access to Eligibility Checklist and grant portal login credentials
- To ensure you receive Grant Portal log-in email and & Submission Confirmation Emails, “Whitelist” the following Andar360 IP addresses:

IP Address
76.12.237.68
173.239.113.226
76.12.218.3
76.12.237.151

- Works best with PC (vs. Mac);
- Compatible Document Types for uploads: PDF, Word, Excel, jpeg

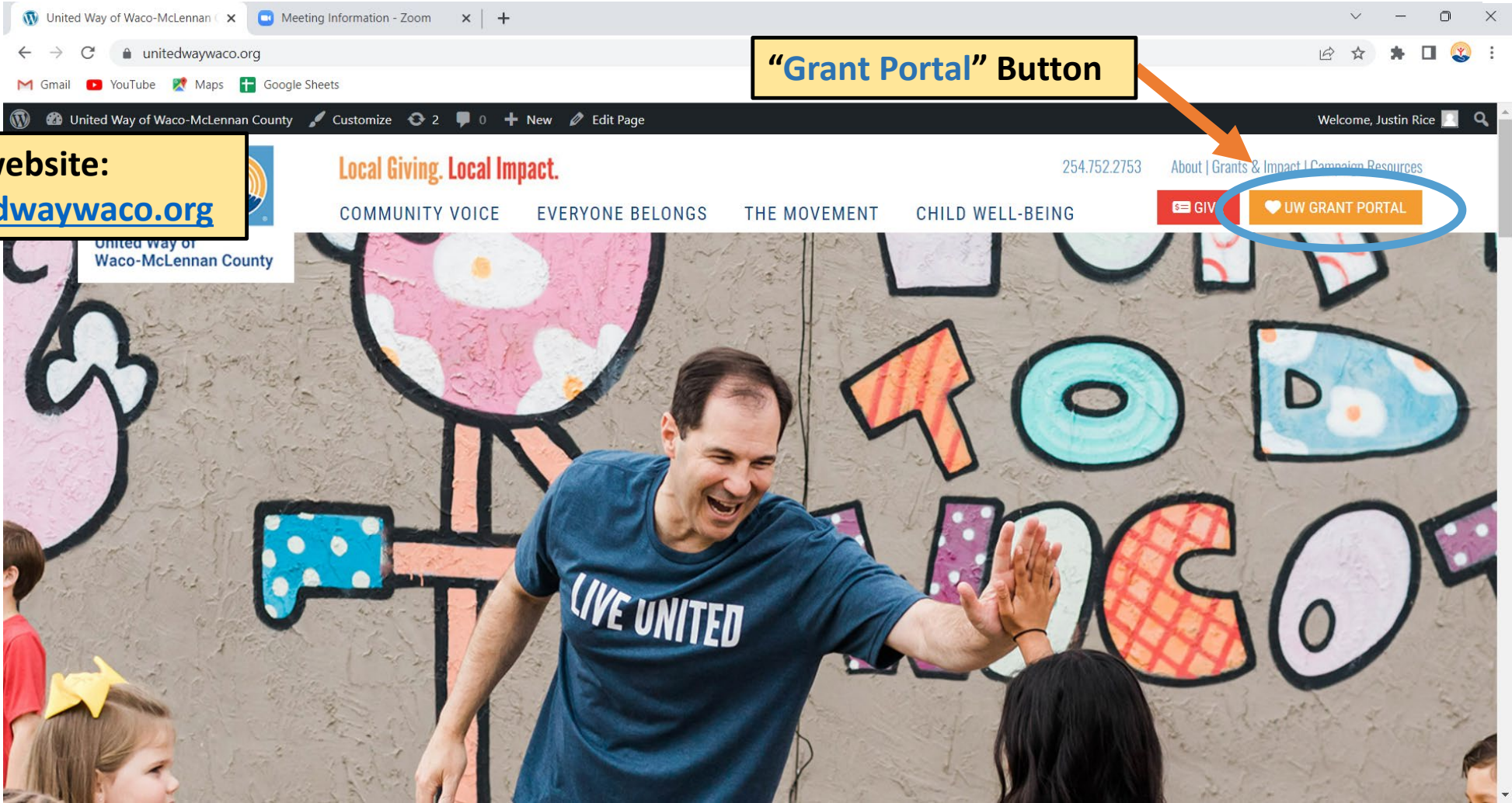
Grant Portal – Entry



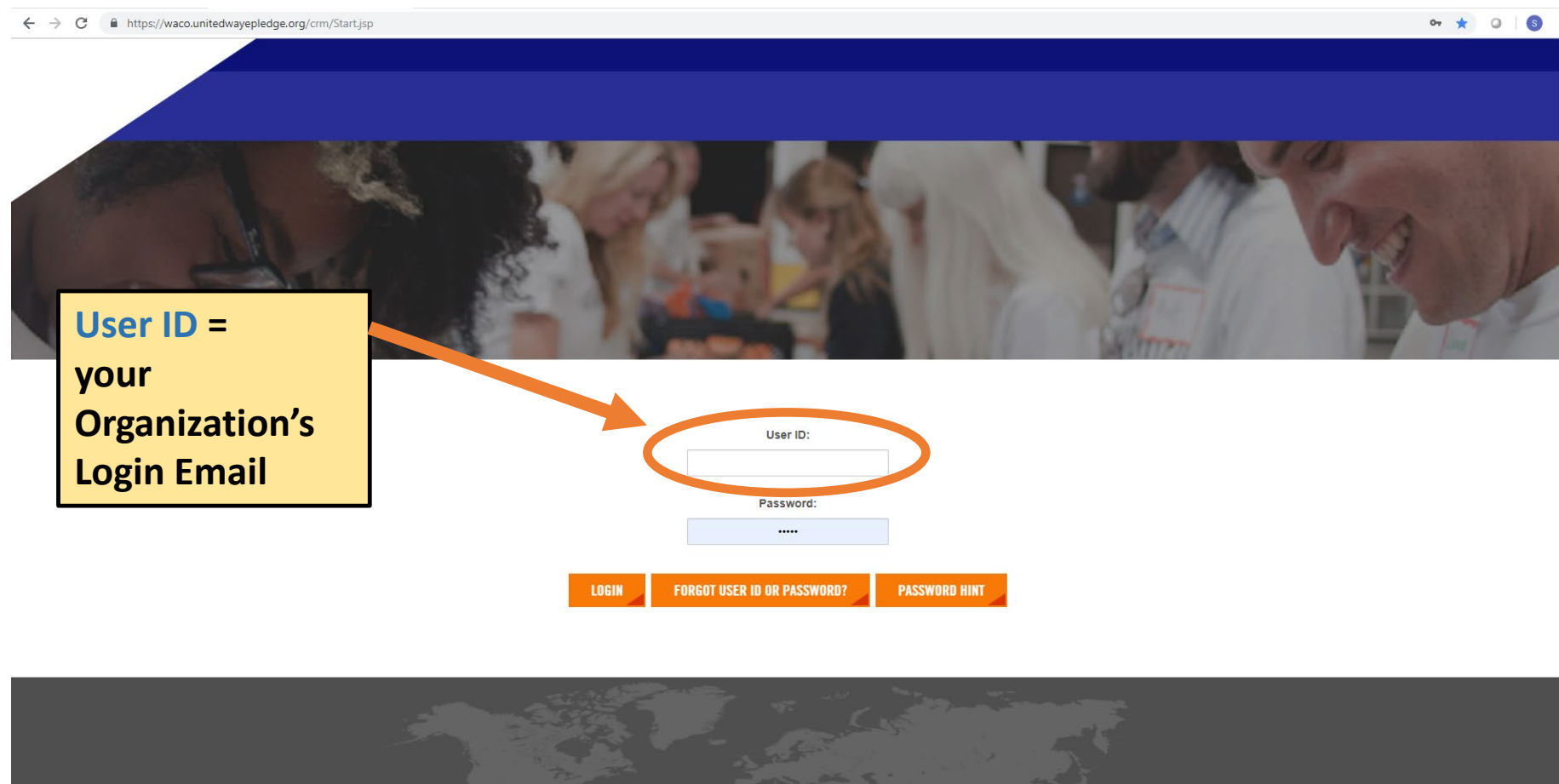
United Way of Waco-McLennan County

Go to UW website:
www.unitedwaywaco.org

“Grant Portal” Button



Grant Portal – Login Page



The screenshot shows a web browser window with the URL <https://waco.unitedwaypledge.org/crm/Start.jsp>. The page features a blue header and a background image of people. A yellow callout box on the left contains the text: **User ID = your Organization's Login Email**. An orange arrow points from this box to the 'User ID:' input field, which is circled in orange. Below the 'User ID:' field is the 'Password:' field, which is currently masked with dots. At the bottom of the login form are three buttons: 'LOGIN', 'FORGOT USER ID OR PASSWORD?', and 'PASSWORD HINT'. The bottom of the page has a dark grey footer with a world map graphic.

Grant Portal – Menu

Home **Packages** Organization Profile Resources Main Website Logoff

Switch Organizations

Welcome to Community Building Home Page



United Way
of Waco-McLennan County

ABOUT

Our History
Our Mission
Our Leadership

[PRIVACY POLICY](#)

SOCIAL



CONTACT US

1516 AUSTIN AVE, SUITE 2
WACO, TX 76701 | [254.752.2753](tel:254.752.2753)







Tabs:

- Home
- Packages
- Organization Profile (Main Contact Info)
- Resources
- Main Website (United Way)

“Packages”

Packages

“Status”

Due Date	Description	Status	
Dec 01, 2019	Eligibility Package	Outstanding	 
Oct 21, 2019	1st Quarter Report	Completed	 
Apr 19, 2019	Application Package	Completed	 

“Due Date”













Click “Print” Icon, for PDF or to Print full “Package”

Package Items List

Eligibility Package - Package

Sample Agency - Agency

Items marked
“Outstanding” or
“Completed”

	Section	Status
 	Eligibility Checklist - Organizational Information	Outstanding
 	Eligibility Checklist - Program 1 Information	Outstanding
 	Eligibility Checklist - Program 2 Information	Outstanding
 	UPLOAD - IRS - 501(c) 3 Letter	Outstanding
 	UPLOAD - Audit/Annual Reviewed Financial Statements	Outstanding
 	UPLOAD - IRS 990 (Most Recent)	Outstanding

[RETURN](#)

Completing a Form



United Way of
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Eligibility Checklist - Organizational Information

Organizations: 1 - Eligibility (Funding Team)

Sample Agency (118109 - Agency)

New Applicant Eligibility Checklist - Organizational Information

1. Organization Contact Information

Organization Name:

Executive Director/CEO Name:

Address:

City/Town:



Enter information

Completing a Form



United Way of
Waco-McLennan County

4. My organization has a Mission Statement.

Yes



Check box

No

If yes, please provide your organization's Mission Statement here. If no, please explain, as applicable:



**Provide
explanation for
any No's or boxes
not checked**

Completing a Form – Save & Submit

Save often!

Save your responses and Submit this section of the Eligibility Package when you are ready. In the next section(s), you will be asked for more information about the program(s) for which you are seeking funding.

SAVE

SUBMIT

RETURN

NEXT

Click “**Submit**” - to
Mark the section
“Completed”

Click “**Next**” to go
to the next section

Document Uploads

Click **“Add”** - to
upload a
Document

IRS - 501(c) 3 Letter

Sample Agency (118109 - Agency)

Documents Maintenance

There are currently no documents available for display.

ADD

SUBMIT

RETURN

NEXT

PREVIOUS

Click **“Submit”** -
to Mark the item
“Completed”

Document Uploads – Add & Submit

UPLOAD: Audit / Financial Statements (by \$ size of Organization)

Sample Agency (118109 - Agency)

Add Document

Year: 2019

Class: Organizational Budget-to-Actual (PY)

Type: Actual

Document Description:

File Name:

Effective:

Expiry:

1. Enter
“Document
Description”
(Title)

2. Click
“Choose File”
and upload
from your
computer







3. DO NOT enter
“Effective” & “Expiration”
dates

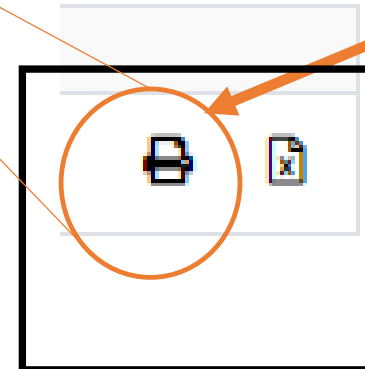
4. Click “Add”

PDF/View/Print Copy

Home Application Organization Profile Resources Main Website Logoff

Packages

Due Date	Description	Status	
Dec 01, 2019	Eligibility Package	Outstanding	 
Oct 21, 2019	1st Quarter Report	Completed	 
Apr 19, 2019	Application Package	Outstanding	 



Click **“Print”** Icon on Package to save as a PDF or print a copy for your records

“Un-Submit”/Edit

		UPLOAD - Organizational Budget-to-Actual (Prior Year) - (Required)	Outstanding
		UPLOAD - Organizational Budget - Proposed/Current Year (Required)	Outstanding
		UPLOAD - Audit or Annual Reviewed Financial Statements (Most recent/last FY) - (Required)	Completed
		UPLOAD - Most Recent IRS 990 (Required)	Outstanding

1. Item is
“Completed”

2. Click “Un-Submit”
Button















		UPLOAD - Organizational Budget-to-Actual (Prior Year) - (Required)	Outstanding
		UPLOAD - Organizational Budget - Proposed/Current Year (Required)	Outstanding
		UPLOAD - Audit or Annual Reviewed Financial Statements (Most recent/last FY) - (Required)	Outstanding
		UPLOAD - Most Recent IRS 990 (Required)	Outstanding

3. Shows item as
“Outstanding”
again

Check Items for Completed Status

Onboarding Package - Package

Sample Agency - Agency

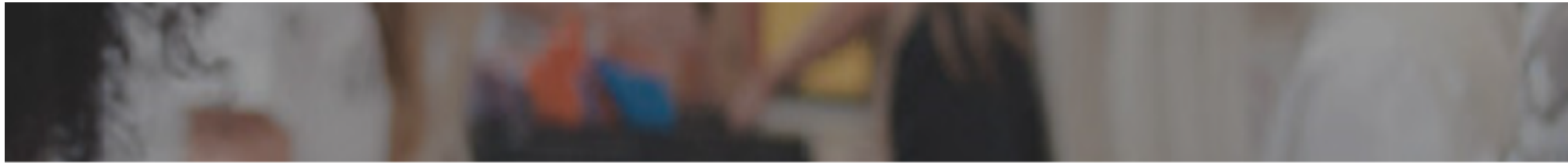
	Section	Status
 	RSVP to Orientation Session	Completed
 	Funded Partner Standards & Guidelines with MOU	Completed
 	EFT Payment Set-up / Verification	Completed
 	"Get Connected" Portal Set-up / Verification	Completed
 	United Way Logo (Download)	Completed
 	Organization Logo (Upload)	Completed

*****For Final Submission**:**

All Items in Package must be marked as **“Completed”**

RETURN

Final Submission – Check Full Package



Switch Organizations

Packages

Due Date	Description	Status	
Oct 21, 2019	1st Quarter Report	Outstanding	 
Aug 12, 2019	Onboarding Package	Completed	 
Apr 19, 2019	Application Package	Completed	 

Verify your full
Package shows
“Completed”

Confirmation Email




United Way of
Waco-McLennan County

From: United Way of Waco-McLennan County <grants@unitedwaywaco.org>
Date: October 22, 2019 at 1:28:20 PM CDT
To: youremail@yourorganization.org
Subject: CB Package 1st Quarter Report has been completed

Email comes from:
United Way of Waco-
McLennan County (but
via “Andar360”
software server)

If you do not receive an Email confirmation:

- 1) **Check the IP Address “Whitelist”** on the UW website to unblock Andar360 emails
- 2) **Contact UW:**
grants@unitedwaywaco.org

United Way of Waco-McLennan County **LIVE UNITED** 

GIVE. **ADVOCATE.** **VOLUNTEER.**

Hello **Your Name**,

Your organization's 1st Quarter Report has been successfully completed and submitted.

If you have questions or need further assistance regarding this e-mail, please contact United Way of Waco-McLennan County at (254) 752-2753 or grants@unitedwaywaco.org.


Thank you,

The Grants and Impact Team
United Way of Waco-McLennan County

Grant Portal - Navigation



United Way of
Waco-McLennan County

- Navigation & Buttons:
 - **Previous:** Previous Page/Item in Package
 - **Next:** Next Page/Item in Package
 - **Return:** Goes back to Package List view
 - **Save:** Saves page
 - **Submit:** Submits item; marks as “Completed” status
 - **To Un-Submit / Edit:** Click  sign on list view; changes to “Outstanding;” can now edit the item
 - **To Delete Item:** Click “X” next to a completed items (where applicable)
 - **To View/download PDF of Completed Section:** Click “print” symbol next to section
 - **Final Submit of full Package:** Click “Submit” for each item, marking each “Completed”



Resources (UW Website)

- Impact Framework
- Eligibility Criteria
- Grant Process Timeline
- Slides & Recording from this Session
- Glossary of Terms
- Frequently Asked Questions (FAQs)

www.unitedwaywaco.org

Requesting Access to Eligibility Checklist

- If you want to enter the Eligibility process, you must email grants@unitedwaywaco.org to request access to the Eligibility Checklist.
- UW Staff will set up a login for the grant portal & email you instructions
- Deadline to request access to Checklist is **November 14**

Technical Assistance - Eligibility



United Way of
Waco-McLennan County

Open: Monday, October 28 – Monday, November 18

Hours: M-Th 9am-5pm & F 9am-3pm

- Submit Qs to: grants@unitedwaywaco.org or 254-752-2753
- Website Resources: www.unitedwaywaco.org

Q / A