United Way Tar River Region

Community Investment Process
Quick Reference Guide for Interested Nonprofits

Minimum Organizational Requirements:

- 501c3 IRS Determination Letter
- Current Solicitation License or Exemption Letter from the NC Secretary of State
- IRS Form 990 or Form 990EZ (if your organization is required to file one by the IRS)*
- Financial documents such as a current budget and, if requested, an annual audit*
- Signed USA Patriot Act and Anti-Terrorism Compliance Measures
- Signed United Way Guidelines
- Board of Directors List

Program Funding:

Funding requests are for existing and proven programs. New programs will not be considered.

Impact Areas:

All funded programs must fall under one of United Way's three Impact Areas. The areas are:

- Health
- Education
- Income & Independence

Funding Cycle:

July 1st through June 31st

Tentative Community Investment Timeline (subject to change)

Time frame	United Way	Community Partner
November	Letter of Intent goes live on e-CImpact	Letter of Intent goes live on e-CImpact
December		Letter of Intent is due on e-CImpact
Late-December/Early January	LOI is reviewed for approval/denial	
January	Applications go live on e-CImpact	Applications go live on e-CImpact
February/March		Applications due on e-CImpact
February/March	Review applications	
Early-March	Board of Directors Meeting- Review/Approve Impact Area Funding Amounts	
March/April		Community Partner Tours
April/May		Community Partner Presentations
June	Board of Directors Meeting- Review/Approve Community Investment recommendations	
June	Award letters are sent out	Award letters are sent out
June	12-Month Report goes live on e-CImpact	12 Month Report goes live on e-CImpact
Late-June		Deadline to request a debriefing
Early-July	Debriefing	Debriefing
July		Deadline for Appeals
		12 Month Report due on e-CImpact
Early-August	Executive Committee- Review and make decisions on Appeals	

*If approved for funding, a program will be funded for one or three years. If funded for three years, an application and presentation will not be required until the three years are completed. Depending on funding level, a yearly audit may be required.

Glossary of Terms

Community Investment Process: Brings together Community Partners and volunteer Impact Teams in our three Impact Areas—Education, Income and Independence, and Health—to address the pressing needs of the Twin Counties region. By funding programs that address specific community needs, we are building a stronger community and improving the quality of life for thousands.

Impact Areas: Health, Education, and Income & Independence.

Impact Team: There is an Impact Team for each of the three Community Impact Areas: Health, Education, and Income & Independence. The purpose of the Impact Team is to facilitate United Way's Community Investment Process in the three Impact Areas and to monitor the results of those investments.

Impact Team member: United Way Board members and community volunteers with interest and/or expertise and knowledge in the designated Impact Area, as well as a willingness to commit time and attention to the team's responsibilities. A team typically includes two leaders and 5-10 volunteers from the community.

e-CImpact: An online comprehensive grant and performance management software tool that United Way Tar River Region uses for applications and reports. Applicants and Volunteers use this platform to complete all aspects of our Community Investment process.

Letter of Intent (LOI): The purpose of a LOI is to communicate interest in becoming a United Way Partnering Agency by responding to the United Way Tar River Region's RFP (Request for Proposal). The interested agency will describe proposed program components, projected activities, and anticipated impact on United Way Community Goals. Only existing programs with a proven track record will be considered – new programs will not be approved.

Application: Community Partner will use e-CImpact to complete an application for funding. An application may be required to include, but is not limited to the following items: Program Information, Client Demographics, Intended Program Outcomes, Budget, Success Story, and What a Dollar Does.

12-Month Report: Community Partner will use e-CImpact to input data for the 12-month funded cycle. Report is used to track progress, determine results, and to share information with our community.

Community Partner Tour: Impact Team members visit Community Partners and Letter of Intent Organizations within Impact Areas to review funded programs and operations.

Community Partner Presentations: Impact Teams, One-Year Funded Partners, & Letter of Intent (LOI) organizations meet to discuss Applications, Intended Program Outcomes, & Results.

Special Note: Interested Nonprofits are asked to visit the United Way Tar River Region website to review/read our Community Impact Plan at www.unitedwaytrr.org, Community Impact Tab.

For more information, contact Ginny Mohrbutter at ginnymohrbutter@unitedwaytrr.org or (252) 937-2213 ext. 203.