



# 2008 Community Investment Policy Manual



**United Way**  
of Peel Region

### Our Vision

United Way will champion and inspire sustainable change that strengthens community and improves lives.

### Our Mission

To engage with our community, through partnerships, to ensure people are cared for, connected and included.

### Our Values

- Inclusion
- Collaboration
- Accountability
- Integrity
- Visionary
- Voluntarism

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# Acknowledgements

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Under the mandate of the Paving The Road Working Group, a Policy Review Sub-Group undertook an extensive review of policies and procedures governing United Way's community investment process.

The purpose was to ensure alignment of community investment policies with new United Way community investment strategies developed through the recent priority-setting process and released in the *On the Road to a Better Way Report* (April 2002).

A broad range of policy documents developed by other funders (including many United Ways) was reviewed by the Sub-Group in an effort to adopt best practices in United Way's revised community investment policy document. Consultations with other area United Ways were also conducted.

The following funders are acknowledged for providing their policy documents and their generosity in sharing ideas with United Way.

- Ontario Ministry of Health, Long Term-Care
- Region of Peel
- The Ontario Trillium Foundation
- United Way of Burlington & Greater Hamilton
- United Way of Calgary & Area
- United Way of Greater Toronto
- United Way of Greater Victoria
- United Way of Halifax Region
- United Way of Kamloops & Region
- United Way of Kingston, Frontenac, Lennox and Addington
- United Way of Kitchener-Waterloo & Area
- United Way of London & Middlesex
- United Way of Milton
- United Way of Peterborough & District
- United Way of Regina
- United Way of Sault Ste. Marie
- United Way of The Lower Mainland (B.C.)
- United Way of Windsor-Essex County
- United Way of Winnipeg
- United Way of York Region
- United Way/Centraide (Central N.B./Région du Centre du N.-B.) Inc.
- United Way/Centraide Ottawa

United Way's funded agencies contributed meaningful feedback to the policy review process through an Agency Focus Group and written comments. Their valuable insights will ensure the perspective of these key stakeholders are reflected in this Manual.

Feedback from United Way's experienced Citizen Review volunteers has also been captured in the new document. We thank those who were able to make time to carefully review the policies and provide comments.

Appreciation is also extended to Sue Ritchie, Chair of the Policy Review Sub-Group, Co-Chair of Community Investment Cabinet and Board Member, for her unwavering commitment to ensuring the policy review process was inclusive, comprehensive and carefully documented. Members of the Sub-Group are thanked for their enthusiastic participation in analyzing, debating and challenging the many policies, current and new.

Thank you to:

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- Tellis George, United Way Board Member
- Savita Junnarkar, United Way Board Member
- Lynn Petrushchak, Executive Director, Dixie Bloor Neighbourhood Centre
- Susan Ross, Assistant Director, Community Investment
- Zainul Sajan Virgi, Project Coordinator, Paving the Road
- Anita Stellinga, Director, Community Investment

# Introduction

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United Way of Peel Region is committed to strengthening and stabilizing the human service sector in tandem with agencies and other key stakeholders. United Way's investment strategies are designed to respond to the unique needs of Peel Region.

This Manual outlines United Way's long and short investment strategies in its continued role as a funder and its enhanced role to build community capacity among agencies in the Region. It is intended to guide and assist community agencies, Citizen Review Volunteers and the United Way Board of Directors in understanding and implementing the process of community investment.

This edition reflects changes from earlier versions and replaces all previous community investment documents. It should be carefully reviewed by all agencies applying for funding. United Way may amend this Manual from time to time as needed.

As of this writing, the following community investment streams are available through United Way:

- Community Priorities Fund
- Community Response Fund
- Strengthening Organizational Effectiveness Fund
- Community Contingency Fund

This Manual should be read in its entirety. Individual policies comprising the Manual should not be considered separately and are to be interpreted in relation to the underlying principles of United Way.

Any agency wanting to apply for United Way community investment funding should contact:

Coordinator, Community Investment  
905-602-3619

# Strategic Objectives

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## **Strategic Direction #1: Diversify and increase sustainable financial resources**

### Strategic Objectives:

- 1a. Strengthen relationships with key stakeholders to attract and retain donors and resources.
- 1b. Diversify the resource development program to achieve sustainable growth.

## **Strategic Direction #2: Invest United Way resources strategically to address human service priorities**

### Strategic Objectives:

- 2a. Develop and implement a five-year investment strategy.
- 2b. Invest in agencies that are well managed, possess strong governance, and are effective and accountable.
- 2c. Measure and evaluate the impact of United Way investments in addressing Human Service priorities.

## **Strategic Direction #3: Strengthen the capacity of the human service sector**

### Strategic Objectives:

- 3a. Develop and implement a capacity building strategy for the human service sector.
- 3b. Recognize and promote the value of diversity of the people in our community through United Way's internal diversity initiative and external outreach.
- 3c. Develop and implement an advocacy plan to strengthen the sector, address key social issues and reduce gaps.

# Blueprint for Action — On the Road to a Better Way

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United Way undertook a priority setting process in 2001 to engage the community in identifying issues that were important to them. This initiative, *On the Road to a Better Way*, was designed to help United Way better understand and adapt to the ever-changing dynamics of our social environment.

The recommendations developed reflect United Way's commitment to invest in a network of services as an important community asset but also to increase its focus on strengthening community capacities.

Key recommendations in the report are as follows:

1. Continue to invest in human service agencies that provide direct services;
2. Expand the role of United Way in developing community capacity;
3. United Way will continue to promote policies and actions that recognize and support community diversity in its funded agencies, in the structure of United Way and in the community. Diversity includes, but is not limited to age, gender, race, ethnicity, class, religion, abilities and sexual orientation.
4. The following areas have been identified as potential areas for additional investment:
  - Helping women and their children who are victims of physical, sexual and emotional abuse
  - Reducing poverty
  - Supporting seniors to live independently
  - Supporting families in stress
  - Helping newcomers and immigrants
5. A United Way Leadership Team will be formed to develop the details of implementing these recommendations over the next three to five years.

## Implementation Of Recommendations

A subsequent working group of United Way stakeholders was charged with developing implementation strategies for the report's recommendations. United Way's Board of Directors approved the recommendations in June 2003. These recommendations will guide United Way for the next five years.

All funded programs must respond to United Way's investment priorities. Funding will be impacted for currently funded programs that do not complement United Way's investment priorities. All funding transitions will be developed in consultation with agencies using the following principles:

1. Ensure ongoing, transparent communication and consultation with current funded agencies and other stakeholders.
2. Allow for fair, equitable and timely transition strategies for currently funded programs.
3. Ensure implementation strategies are aligned with United Way's strategic plan.

Community investment plans are approved annually by the Board and take into consideration campaign achievement, community investment funds available for distribution, community needs, United Way's mission and investment priorities.

# United Way Funding Principles

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## United Way...

- Strives to be a stable, sustainable funder.
- Is committed to investing in a range of human services that achieve measurable impact for the residents of Peel.
- Invests in a continuum of services that includes preventative, rehabilitative and crisis services.
- Is committed to funding programs delivered by non-profit registered charities that are aligned with United Way's Mission, Vision, Policies and Investment Priorities.
- Expects funded agencies, in every way possible to actively support its Mission and Vision.
- Develops investment strategies that embrace coordination with other funders.
- Is committed to the regular review of its mission, vision and funding principles and the review and adjustment, where necessary, of United Way investment strategies to reflect the changing needs of the community.
- Maintains commitment to supporting a viable infrastructure of human services.
- Funded programs and services are collaborative, accessible, effective, accountable and build capacity.

# Eligibility Criteria for Funding

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Eligibility for United Way funding includes meeting all of the following:

- The Community Priorities Fund is only accessible to agencies registered with Canada Customs and Revenue Agency as a charitable organization. Non-registered charities may be eligible to access other funding streams if partnered with a registered charity. For further information, please refer to the eligibility criteria for specific funding streams;
- Agencies and lead agencies must have been in continuous operation for a minimum of two years with demonstrated success prior to the date of application.
- The agency must be providing services and programs to residents of Peel Region that respond to demonstrated human care needs;
- The agency must be governed by a volunteer Board of Directors;
- If the agency is part of a regional, provincial or national organization, it must, have at minimum, a local advisory committee.
  - The local advisory committee must provide United Way with their specific roles and responsibilities as it relates to the agency and the rest of the organization.
  - The local advisory committee must reflect the local community as it relates to the regional operations' catchment areas and consumer groups. The agency must be able to demonstrate how local volunteers influence the use of local United Way dollars within the local community.
  - The local advisory committee must identify how monies being provided by United Way will be spent in Peel.
- The agency must utilize the resources of volunteers in the support of effective, meaningful and safe services and to build community capacity, where appropriate,
- The agency must be able to demonstrate that it has the support of the community and has knowledge of relevant issues and needs in Peel Region;
- The agency must abide by United Way's policies including Fundraising Policy which restricts fundraising activities;
- The agency must provide an audited financial statement to United Way within six months after year end for each year the agency continues to receive funding from United Way;
- The agency is required to carry general/commercial and board liability insurance in the minimum amount of \$2,000,000 each. The agency is required to submit proof of insurance with their annual Funding Report.
- The agency must comply and provide evidence, upon request, with the Ontario Human Rights Code in hiring practices and service delivery.

## **United Way does not:**

- Invest in programs legislated by the government, for example those under the mandate of Children's Aid Societies, libraries, hospitals, education;
- Duplicate other sources of funding;
- Invest in services where the focus is on preservation of cultural heritage;
- Invest in services that are primarily religious or political in nature;
- Invest in programs where the primary focus is recreation/sports, the arts or medical research;
- Invest in capital costs, such as large-scale purchases of equipment, vehicles, furniture or building costs.

**Financial Support from United Way**

In determining the decision to invest in an agency or program, the Board of Directors of United Way shall consider the following:

- The optimum use of available financial and human resources of United Way;
- The policies and priorities of United Way;
- How the investment might positively or adversely affect the goodwill or support of United Way and other funded agencies;
- That United Way may not be in a position to meet all recognized needs at a particular time, notwithstanding that an applicant agency may otherwise meet funding criteria.

**Funding from United Way:**

- Shall be applied to meeting operating expenses only (not capital expenditures);
- May take a variety of forms, such as provision of administrative funding or funding of a specific program;
- Shall be based on the availability of financial resources and on information received from the agency concerning its programs and revenue (including sources of revenue other than United Way).

# Community Investment Process Goals and Principles

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The amount for community investment is approved annually by United Way's Board of Directors taking into consideration:

- Campaign achievement;
- United Way's mission and investment priorities;
- Emerging community needs.

## Goals:

1. To create a process that is simple, accessible, easily understood and efficient.
2. To base investment decisions on established priorities and guidelines, developed with input from stakeholders.
3. To maintain volunteer involvement in the process.

## Principles:

1. An appropriate balance shall be maintained between United Way's stewardship responsibilities and the autonomy of the agency. United Way, through its investment in programs, is accountable to the donor, the community it serves and the general public for responsible fund distribution. The agency is responsible for its own activities and internal management.
2. The relationship between United Way and the agency is based on trust. All transactions shall be open, fair and consistent with established policies and procedures.
3. United Way is committed to open communication with agencies regarding factors that may influence resource distribution decisions in each funding year.
4. United Way is committed to addressing current and emerging human care needs in the community based on available research, community consultation and available resources.
5. The involvement of Board volunteers in policy formation and decision-making is viewed by United Way as fundamental to the operations of both United Way and funded agencies.

It must be noted that United Way may not be in a financial position to meet all the recognized needs within the Region, notwithstanding the fact that an agency may otherwise meet or exceed expectations for all criteria.

# Community Priorities Fund

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## Overview

The funding stream has been designed to respond to the feedback received during agency consultations and the recommendations contained in On The Road To A Better Way Report. It reflects United Way's deepened resolve to invest in direct service agencies as an important community asset and to continue support of proven established programs with demonstrated success. This fund has five focused priorities, which will support a network of services within the human service sector in Peel:

- Strengthening families and children
- Helping abused women and children
- Helping newcomers and immigrants to settle and integrate
- Alleviating hunger, homelessness, and poverty
- Supporting seniors to live healthy and independent lives

Each priority area has a rationale followed by a description including activities that have been identified in the consultation process as being critical areas of need. The priority areas include system and participant outcomes.

The purpose of the funding stream is two fold:

1. **Invest in a solid, reliable human care service network**

United Way has traditionally invested in local service agencies that together create a solid network of support around a community. Often these funded agencies become active partners in designing a method of program and service delivery that impacts the community in a meaningful way and/or enhances the community's vision. The stable service network's primary purpose is remediation and amelioration, which is achieved by providing services and support that address the problems people already face. Individual agencies create opportunities for people to build resiliency and make changes in their own lives.

2. **Invest in programs and services to address root causes**

Whereas the first purpose is remediation and amelioration, the second purpose is prevention that reduces or eliminates the complex and interrelated root causes of problems so that fewer people have to deal with them in the future.

Working toward a combination of both purposes results in opportunities for people to address their current problems but also provides for long term, environmental change aimed at improving the quality of life and futures of people most affected by systemic social problems.

## Community Priorities Fund — Strengthening families and children

### RATIONALE

#### Definition of Family:

A family may be defined as a single individual living on their own, two individuals in a committed relationship, parents with a child/children, single parent with a child/children, parents/caregivers with a child/children and extended family members including grandparents, aunts and/or uncles.

Agencies clearly articulated that families today are experiencing multiple stressors from a variety of sources ranging from financial, employment related issues, health, education, meeting the growing needs of children and often elderly parents. Guilt, exhaustion, stress, depression, reduced patience, poor health are some of the symptoms exhibited by a growing number of families in Peel. These stressors further compound conflicts in relationships (partner-child conflict, parent-teen conflict, partner-partner conflict). Add to that, the caring of elderly parents with complex health needs and/or special needs (intellectual, emotional or physical) children/adults and the stress level increases substantially.

Technology has changed the environment at work. Families are experiencing a high-paced, high-stress environment, with tighter timelines, expectation to multi-task, as well as, keeping a pulse on the latest trends and information within their sector through the advent of World Wide Web. The combination of the above leaves little down time for an individual. The parent often rushes from one demanding environment to another where he/she is faced with the growing needs of children and often elderly parents.

Families living just above the poverty line find their stress level even higher as issues around money continue to play a consuming role in their lives. These families often find themselves in a difficult position of wishing that they could provide more for their children, thus increasing their anxiety level, but in turn having access to only short-term, high turn over employment opportunities.

### FUNDING GOALS

- To assist individuals and families to overcome obstacles and achieve social, economic, emotional support and stability leading to self-sufficiency.
- To address the special needs (intellectual, emotional or physical) of individuals and the support needed for their families.
- To establish opportunities for involvement and social interaction.
- To promote healing of damaged relationships (partner-partner, parent-child, parent-teen)
- To nurture the ability of family members to deal with conflicts in healthy ways
- To promote collaboration and improved efficiency of services.

All services/programs to include outcomes and an evaluation plan, including tools and timelines.

### OUTCOMES

United Way is committed to funding programs, which will result in stronger, stable families. In addition, United Way is committed to a holistic approach to service planning and delivery through effective programs and/or referral processes. In the application of all programs, United Way expects agencies to clearly address their approach to holistic service planning and delivery. Furthermore, United Way is dedicated to ensuring quantitative and qualitative results for one or more of the following outcomes:

#### *Program Outcomes*

#### *Participant/System Outcomes*

- Increase in ability for youth, adults, seniors and families to develop and maintain supportive networks including supportive caregiver networks related to special needs (intellectual, emotional, physical) children and elderly parents
- Increase in skills to develop better relationships with family members.
- Increase in the skills of children, youth, adults, seniors and families to effectively reduce their levels of stress.

## Community Priorities Fund — Strengthening families and children

- Increase the skills of parents/caregivers to appropriately relate to, support, and guide children and youth including special needs (intellectual, emotional, physical) children, youth and adults.
- Increase in the number of positive opportunities for youth including home work clubs, youth mentoring opportunities, strengthening life and social skills and leadership opportunities.
- Improve emotional and mental health of children, youth, adults and seniors.
- Increased enhanced and holistic services for individuals who are differently abled (intellectual, emotional, physical) including support and education for caregivers of special needs, family members and elderly parents.

## Community Priorities Fund — Helping abused women and children

### RATIONALE

Agency participants indicated a growing number of clients, male and female, youth, adults, or seniors who are either victims or perpetrators of abuse (emotional, physical, sexual, financial). There continues to be an increasing number of women/girls in unsafe relationships resulting in abuse and often violence. Children are particularly vulnerable as they witness their parents in a violent situation. The number of children witnessing abusive situations continues to grow in Peel. In addition, the number of families engaging in abusive behaviour in Peel continues to grow. Children and youth are encountering increasing incidences of bullying and violence at school. Furthermore, agencies identified the need for services aimed at crisis, intervention, prevention and outreach for all client groups including newcomers, immigrants, children, youth, adults, seniors, individuals who are differently abled (intellectual, emotional, physical) and individuals from the gay, lesbian, bi-sexual, transgendered and transsexual communities.

### FUNDING GOALS

- To focus on support services aimed at outreach, intervention and prevention for children, youth, women, adults facing the effects of violence, abuse or neglect across diverse communities.
- To promote a holistic response to the issue of abuse.
- To support initiatives that promote collective action, multi-sectoral partnerships and integration of services to achieve desired outcomes.

All services/programs to include outcomes and an evaluation plan, including tools and timelines.

### OUTCOMES

United Way is committed to funding programs, which will support children, adults or seniors facing the affects of violence, abuse or neglect. In addition, United Way is committed to a holistic approach to service planning and delivery through effective programs and/or referral processes. In the application of all programs, United Way expects agencies to clearly address their approach to holistic service planning and delivery. Furthermore, United Way is dedicated to ensuring quantitative and qualitative results for one or more of the following outcomes:

#### *Program Outcomes*

#### *Participant/System Outcomes*

- Improved ability of individuals to engage in positive, non-abusive behaviour
- Increased community awareness and education related to healthy relationships and abuse issues
- Increased access to services to cope with the effects of abuse
- Increased ability of victims, particularly children and youth, to cope with the effects of abuse and break the cycle of violence
- Improved ability of the aggressor to understand, address and change his/her abusive ways.

## Community Priorities Fund — Helping newcomers and immigrants to settle and integrate

### RATIONALE

Peel has been able to attract a growing number of newcomers and immigrants who have chosen to make Peel their home. Agencies indicated that newcomers and immigrants need support in understanding health, education, employment and human service sectors in Peel. These sectors may be significantly different from those of their home country. Roles and responsibilities from a gender perspective may be different from those in their home country. The availability of a range of human services is something many are not afforded in their home countries.

Newcomer and immigrant serving agencies have found that settlement in fact takes ten years, as oppose to government mandated settlement services of three to five years. Many issues arise after this initial settlement period including intergenerational conflict, supporting the different roles for men and women, issues of abuse, parents fully understanding the education system so as to effectively support their children in their academic careers and continuing financial issues particularly if their employment credentials are not recognized in Canada and they are only able to access short-term, high-turn over employment opportunities.

Newcomers and immigrants come to Peel with a wide range of education, skills and experience. A significant portion of foreign trained workers reside in Peel and are faced with their education and experience being unrecognized in the workforce. As a result, foreign trained workers access services in Peel with the hope of attaining sustainable employment opportunities preferably in their field of training and expertise.

### FUNDING GOALS

- To enhance settlement and post-settlement services and programs .
- To establish outreach, prevention and education related to the following priority areas: helping abused woman and children, supporting seniors to live healthy and independent lives, strengthening families and children, alleviating hunger,

homelessness and poverty, and helping newcomers and immigrants to settle and integrate.

- To promote collective action, multi-sectoral partnerships and integration of services to achieve desired outcomes.

All services/programs to include outcomes and an evaluation plan, including tools and timelines.

### OUTCOMES

United Way is committed to ensure that newcomers and immigrants are able to participate and contribute effectively to their chosen home. In addition, United Way is committed to a holistic approach to service planning and delivery through effective programs and/ or referral processes. In the application of all programs, United Way expects agencies to clearly address their approach to holistic service planning and delivery. Furthermore, United Way is dedicated to ensuring quantitative and qualitative results for one or more of the following outcomes:

#### *Program Outcomes*

#### *Participant/System Outcomes*

- Provision of enhanced settlement and post-settlement services for newcomers and immigrants
- Enhanced supports and services which address intergenerational conflict and develop harmonious relationships within the family.
- Enhanced holistic programs and services available to address issues related to abuse, hunger, homelessness and poverty, strengthening families and enabling seniors to have the highest quality of life.
- Increased outreach, prevention and education regarding related to the following priority areas: helping abused woman and children, supporting seniors to live healthy and independent lives, strengthening families and children, alleviating hunger, homelessness and poverty, and helping newcomers and immigrants to settle and integrate.
- Increased participation and meaningful civic engagement of newcomers and immigrants.

## Community Priorities Fund — Alleviating hunger, homelessness and poverty

### RATIONALE

Agency participants indicated that there is a growing number of youth, adults, seniors and families, with a growing proportion of women/girls, accessing services in Peel who are living in poverty or just above the poverty line. These individuals need assistance while living in a shelter environment and then need appropriate support, skills, and education to assimilate back into the community environment. Agency participants indicated the need for enhanced services, which would address the diverse and growing needs for clients from counselling to employment skill development to education to services, which would serve the mental, emotional and physical, needs of those living in poverty, facing hunger and/or homelessness.

### FUNDING GOALS

- To support community development strategies that address the root causes of social and economic issues
- To support strategies that reduce the dependence on crisis services and promote self-sufficiency
- To support people living in vulnerable communities to build capacity and opportunities for social inclusion
- To promote collective action, multi-sectoral partnerships and integration of services to achieve desired outcomes

All services/programs to include outcomes and an evaluation plan, including tools and timelines.

### OUTCOMES

United Way is committed to fund programs, which will alleviate poverty, hunger and homelessness. In addition, United Way is committed to a holistic approach to service planning and delivery through effective programs and/or referral processes. In the application of all programs, United Way expects agencies to clearly address their approach to holistic service planning and delivery. Furthermore, United Way is dedicated to ensuring quantitative and qualitative results for one or more of the following outcomes:

#### *Program Outcomes*

#### *Participant/System Outcomes*

- Increased support networks within the community for individuals and families living in poverty and/or homelessness
- Increased safety and stability for individuals and families living in vulnerable communities to prevent crisis and to regain and maintain stability
- Increased range of support services that address root causes and needs of homeless populations, low-income families and individuals, including the working poor.
- Increased services addressing the mental, emotional and physical needs of individuals and families experiencing poverty and/or homelessness to improve the quality of their life

## Community Priorities Fund — Supporting seniors to live healthy and independent lives

### RATIONALE

The senior population in Peel continues to grow. Seniors have expressed their desire to maintain a high quality of life and their independence. Many seniors accessing services are exhibiting multiple mental, physical health concerns and issues of addiction, in particular those related to prescription medication. In addition, issues of elder abuse, physical, emotional or financial are emerging. Many of the seniors experience loneliness and isolation due to limited or non-existent access to their social and support networks. Furthermore, a growing senior population, particularly women, are living in poverty or just above the poverty line in Peel.

### FUNDING GOALS

- To support programs and services enabling an improved quality of life and independent living for seniors
- To support initiatives that meet the needs of a diverse, growing senior population through education and awareness of healthy aging and healthy living strategies
- To support collective action, multi-sectoral partnerships and integration of services to achieve desired outcomes

All services/programs to include outcomes and an evaluation plan, including tools and timelines.

### OUTCOMES

United Way is committed to funding programs that meet the diverse needs of a growing senior population in Peel. In addition, United Way is committed to a holistic approach to service planning and delivery through effective programs and/or referral processes. In the application of all programs, United Way expects agencies to clearly address their approach to holistic service planning and delivery. Furthermore, United Way is dedicated to ensuring quantitative and qualitative results for one or more of the following outcomes:

#### *Program Outcomes*

#### *Participant/System Outcomes*

- Increased access to services for seniors and their families and/or caregivers, including respite for caregivers
- Increased opportunities for seniors to participate in recreational, social, cultural and daily activities to enhance their quality of life
- Increased supports for vulnerable seniors in the area of elder abuse, poverty, addictions and mental health
- Increased opportunity for civic and social engagement.

# Community Priorities Fund Performance Criteria

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## Eligibility

Agencies seeking to apply to the Community Priorities Fund must meet all basic eligibility requirements as noted on page 9.

## Performance Criteria

Recommendations from On The Road To A Better Way Report, (April 2002) will be implemented through investment decisions based on funds available for distribution, fit with United Way priorities and mission, and the following five performance criteria:

- Cooperation, Coordination, Collaboration;
- Accessibility;
- Capacity Building;
- Effectiveness;
- Accountability.

Each criterion is described using standards that must be met by agencies and their programs and services funded by United Way. However, exemplary performance in all five areas does not guarantee approval of a full funding request.

### Three Categories of Agency Performance Standards:

- NOT ACCEPTABLE practices are those that fail to meet United Way's expectations for performance on one or more standards within a performance criterion. Agencies in this category, which have been receiving Community Priorities Fund, must develop specific plans to meet the criteria for acceptability within a specified timeline or be subject to reduction or termination of funding. United Way staff will closely monitor the agency's progress and compliance with criteria. The agency rated as "not acceptable" on one or more standards will not qualify for additional United Way funding for the coming year. United Way will not fund a new applicant agency evaluated as "not acceptable" on one or more standards within the five performance criteria.
- ACCEPTABLE practices mean that the agency meets all United Way's standards within a performance criterion. Agencies rated as "acceptable" on all five performance criteria may qualify for continued, additional or new United Way funding provided it continues to support United Way's vision and investment priorities.

- EXEMPLARY practices mean that the agency meets all of United Way's exemplary standards. In addition, evidence exists to support the agency's exemplary performance. The exemplary agency may qualify for continued, additional or new United Way funding, provided it continues to support United Way's vision and investment priorities.

## Cooperation, Coordination and Collaboration

### *Definition:*

Agency interaction includes relationships that further its goals and improves the service to consumers.

There are three different kinds of interaction: Cooperation is an informal relationship without commonly defined mission, structure or planning. Information is shared as needed and authority is retained by each agency.

Coordination is a more formal relationship among agencies with compatible missions. It usually involves a specific project or task. Some coordinated division of roles is required, and communication channels are established. Authority still rests with the individual agencies.

Collaboration is a well-defined relationship entered into by two or more agencies to achieve common goals resulting in identifiable, high impact results for the community. The relationship includes a structure with shared responsibility, mutual authority and accountability.

### *Not Acceptable:*

- The agency does not make referrals to or receive referrals from other community services appropriately.
- The agency is not involved, and has no plans to become involved, in any networks, agency groups or coalitions to share information and/or enhance service planning and delivery.
- The agency does not participate in United Way activities or promote its affiliation with United Way.

*Acceptable:*

- The agency has an in-depth awareness of services in its sector and in the community.
- The agency demonstrates cooperation with other agencies resulting in enhanced services for consumers.
- The agency demonstrates coordination with agencies focusing on a compatible mission.
- The agency practices and provides evidence of community collaboration as part of their standard business procedure.
- The agency participates as a member in community collaborations.
- The agency provides evidence of how its community collaborations have directly benefited the community.
- The agency systematically refers consumers to other services, as appropriate, and in turn, receives referrals from other agencies.
- The agency actively participates in at least one local agency network group and can demonstrate the positive impact on consumer services.
- The agency shares resources, such as expertise, facilities and administrative support, with other agencies, networks or coalitions.
- The agency participates in most United Way activities and promotes its affiliation with United Way.

*Exemplary:*

- The agency is involved in appropriate, collaborative activities resulting in high impact services.
- The agency demonstrates leadership in the sector through involvement in and promotion of effective collaboration resulting in increased accountability, responsibility and authority.
- The agency participates in all United Way activities and actively promotes its affiliation with United Way.

**Accessibility**

*Definition:*

United Way promotes policies and actions that recognize and support community diversity in its funded agencies. Diversity includes, but is not limited to age, gender, race, ethnicity, class, religion, abilities and sexual orientation.

Accessibility is achieved when all people in the community have the opportunity and means to participate actively in the agencies established for their benefit as consumers, staff members, volunteers and board members.

Barriers are any factors that limit people's ability to participate, including language, physical location, administrative practices, inappropriate and/or culturally insensitive attitudes within the agency, lack of awareness of services available, fee schedule, hours of service, etc.

*Not Acceptable:*

- Numerous barriers exist in accessing service, being hired or participating as a volunteer; there is either no recognition that these barriers exist or no plan to dismantle these barriers.
- The composition of the consumers/staff/volunteers (including board) does not match that of the agency's mandated community; there are no plans in place to become more inclusive.
- The agency is unable or unwilling to report on the composition of its consumers/staff/volunteers.

*Acceptable:*

- The agency must comply with the Ontario Human Rights code in hiring practices and in provision of services.\*
- The agency has implemented effective policies that address inclusiveness and diversity.
- The agency recognizes existing barriers in accessing service, being hired or participating as a volunteer; there are specific plans for removing barriers that are not based on genuine and reasonable grounds.\*

- The composition of the consumers/staff/ volunteers (including board), as reported by the agency, demonstrates some diversity and matches, to some degree, the agency's mandated community.

*Exemplary:*

- The agency is fully accessible for individuals wanting to access service, be hired or participate as a volunteer.
- The composition of the consumers/staff/ volunteers (including board) matches the agency's mandated community.
- The agency clearly articulates the composition of its consumers/staff/ volunteers. (The Ontario Human Rights code allows certain organizations to limit membership or participation, or to restrict or give preference in employment and to make these decisions based on genuine and reasonable grounds.)

- The agency makes no effort to identify or draw upon the strengths of its consumers or the resources of the community, which could be relevant to its program.

*Acceptable:*

- The agency respects the dignity and integrity of its consumers and delivers programs in a manner that preserves it.
- The agency must show evidence of the investment of volunteer resources and time.
- The agency's programs encourage and help develop consumer knowledge, skills, self-esteem, and/or self-reliance.
- Volunteers and para-professional staff are appropriately used in service delivery.
- The agency identifies and draws upon the strengths of its consumers and the resources of the community, which are relevant to its programs.
- The agency gathers and uses some consumer and/or community input in the design and delivery of its programs.
- The agency can describe a consumer's normal course of involvement with the agency, which demonstrates increased knowledge, capability, self-reliance and/or self-esteem.
- The agency promotes leadership opportunities for consumers, staff and volunteers.

*Exemplary:*

- Agency volunteers include consumers, as appropriate to the agency
- The agency reports that the majority of its consumers complete their involvement with the agency within the intended time frame.
- All agency programs are designed and delivered with consumer and/or community input and participation.
- The agency is aware of and uses current research about enhancing consumers' and/or communities' skills, knowledge, self-reliance and/or self-esteem.

## **Capacity-building**

*Definition:*

Capacity-building takes place when agencies identify and utilize the skills, capacities and assets of consumers and the community. Capacity-building is achieved when knowledge, capability, self-reliance and self-esteem are strengthened and mobilized within individuals, families and communities in order to most effectively address identified issues in a timely and lasting manner.

*Not Acceptable:*

- The agency's programs create or encourage consumers' long term dependency on professional staff.
- Consumers are involved in agency programs for longer than is appropriate or necessary for effectiveness.
- Consumers have no involvement or influence (such as providing feedback for program evaluation) in determining the course of the program in which they participate.
- Participation in the agency's programs does not foster new skills, knowledge, self-esteem or self-reliance in consumers and/or communities.

- The agency has a process to clearly identify and utilize the skills and capacities of its consumers and/or community during their involvement with the agency.
- The agency is knowledgeable about the assets and resources of its community and draws upon and involves them on a regular basis.
- The agency's programs include a preventative component and/or are designed for early intervention.
- The agency contributes to the strengthening and mobilization of its community's capacity.
- The agency demonstrates its success in promoting leadership opportunities for consumers, staff and volunteers.

- The agency has program evaluation procedures or quality controls in place, which include input from program participants to measure identified outcomes.
- The agency clearly reports the impact of its program(s) on its target population or has a plan in place to do so.
- The agency program is having the desired impact on its target population.
- The agency responds to changing community needs.
- The agency's programs are economical to operate.

*Exemplary:*

- The agency regularly reviews its mission and programs to ensure their continuing relevance to community needs.
- The agency is continually developing and refining its evaluation procedures for all programs based on outcome measurement.
- Evaluation findings are a key component in re-designing programs and agency strategic plans.
- The agency is continually reviewing alternate models of service delivery with a view to increasing its desired impact on the target population.
- Agency programs achieve high impact on the target population while being economical to operate.

**Effectiveness**

*Definition:*

Effectiveness is achieved when the desired impact or outcomes of an affordable service can be identified and measured and is consistent with the agency's mandate.

*Not Acceptable:*

- The agency goals, objectives or program descriptions are unclear and/or inconsistent with the mission statement.
- The agency does not capture statistics related to service delivery (i.e. number of consumers served, client profile)
- The agency does not evaluate programs or services and has no plan to do so.
- The agency is unable to describe what outcomes its programs achieve.
- The agency programs have an inadequate impact on the target population and/or are costly in relation to the impact.

*Acceptable:*

- The agency goals, objectives, program descriptions and activities are clear and consistent with the mission statement.
- The agency's targeted outcomes align with United Way's priorities.
- The agency is using its evaluation data for planning purposes.

## Accountability

### *Definition:*

Accountable means the agency is responsible and answerable. United Way is accountable to the donor community for the competent stewardship of donor dollars. Agencies funded by United Way must account to United Way for sound management practices, financial controls and efficient, effective, relevant service to the community.

### *Not Acceptable:*

- The agency does not adequately demonstrate the need for its programs and services.
- The agency does not have a formal planning process to direct its activities and functions.
- The agency does not clearly demonstrate a financial need for funds from United Way.
- The agency's audited financial statements and other financial information raise serious concerns about financial planning, monitoring and/or controls.

### *Acceptable:*

- The agency demonstrates the need for the programs and services funded by United Way.
- The agency has a current strategic plan addressing goals, objectives, desired outcomes and evaluation measures.
- The agency is governed by a volunteer Board of Directors whose members are neither paid for services nor employed by the agency.
- The board composition is reflective of the community the agency serves.

- The agency's Board of Directors demonstrates good governance through planning, evaluation of the executive director and sound financial stewardship.
- The agency demonstrates sound financial planning, monitoring and controls.
- The board has in place policies, procedures and by-laws that are regularly reviewed to guide the activities of the agency.
- The agency demonstrates a need for United Way funds through full disclosure of all current and potential revenue sources.
- The agency is actively pursuing other sources of financial support, including fundraising activities, which are in compliance with United Way's Fundraising Policies.
- The agency's Board of Directors actively develops its skills and competencies.

### *Exemplary:*

- The agency demonstrates that all United Way funded programs and services respond to community needs which have been clearly defined and documented and which are consistent with the agency's mandate.
- The agency demonstrates that it is actively seeking to understand the changing needs of the community in order to adapt its provision of service to consumers.

# Community Priorities Fund Funding Agreement

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A Funding Agreement is a contract between United Way and a funded agency. In signing the Agreement the agency commits to honouring United Way's expectations of outcomes to be achieved by the agency. The Agreement will include the following elements:

- Amount of United Way's Funding And Expected Outcomes
- Funding Term
- Request For Additional Funding / Re-Opening y Approved Use Of Funding
- Accountability Reports
- Citizen Review Report, as applicable

## **Amount of United Way's Funding and Expected Outcomes**

This will detail United Way's investment in programs/services provided by the agency. Cost of living adjustments will be determined annually. The Agreement will include approved outcomes, performance indicators, outcome measurement tools and timelines.

## **Funding Term**

This will outline the term of United Way's investment in the agency's programs/services. Funding Agreements may span one to four years and will be dependent upon expected outcomes. The regular priority review process undertaken by United Way will impact the term of agreement.

New agencies shall be restricted to a one year Funding Agreement. After two years of demonstrated success in achieving expected outcomes, agencies may be eligible for a longer-term agreement.

Those agencies not meeting standards of performance, expected outcomes and/or those facing significant organizational challenges will be placed in a one-year funding agreement.

## **Request For Additional Funding/Re-Opening**

Agencies are expected to undertake long-term planning to avoid requests for additional funding for current programs/services during the term of the Funding Agreement.

However, during the course of the funding term, if an agency can adequately demonstrate need to re-open the term, requests for expansion or new programs may be considered during the annual Citizen Review Process. Agency must consult United Way staff before requesting re-opening of Agreement.

## **Approved Use of Funding**

This will confirm the approved expenditures covered by United Way funding for each program. Agencies may not use United Way funds for purposes other than those approved in the Funding Agreement, or shift funds from one program to another, without written consent from United Way.

## **Funding Reports**

Funding Reports will be required of all agencies with timelines as outlined in the Funding Agreement. The Report will require demonstrated progress related to outcomes and the financial status of funded programs/services. In addition, the overall financial health of the agency must be reflected.

# Community Priorities Fund Review Process

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All applications to the Community Priorities Fund are reviewed through the Citizen Review Process, conducted by United Way Citizen Review Volunteers and Community Investment staff. **New agencies applying for Community Priorities funding must consult with United Way staff to ensure eligibility prior to receiving an application.** The annual process is outlined below.

1. The application process is publicized through the media and agency networks. Interested agencies are directed to United Way staff for information, consultation and application forms.
2. Funding applications and interim reports completed in full, must be submitted by the deadline. Late applications are not accepted.
3. Citizen Review Volunteers are recruited through an open process based on established eligibility criteria.
4. New applicant agencies are visited by Citizen Review Volunteers and United Way staff. Visits may also be scheduled with currently funded agencies.
5. Volunteers meet in Citizen Review Teams to consider the funding requests. Representatives from agencies may be invited to make presentations about the funding request to the Citizen Review Teams.
6. Using the performance criteria, fit with priorities, relevance of outcomes and financial status, the Citizen Review Teams will evaluate each agency's application. Citizen Review Teams will make recommendations to the Community Investment Cabinet on the level and term of investment. Cabinet's recommendations are forwarded to the Board of Directors of United Way for approval.
7. The President/ Chairperson of the agency and United Way sign the Funding Agreement.
8. Following Board approval, a Citizen Review Report, including rationale for funding, evaluative comments and expected outcomes, is prepared for each agency.
9. Agencies are expected to address performance issues raised in the Citizen Review Process in a timely fashion. Where there is insufficient response or where performance concerns warrant, the Community Investment Cabinet and/or staff will intervene. If Community Investment Cabinet and/or staff are unable to resolve the situation, the matter will be referred to the Board of Directors with a recommendation. See Terminating Funding page 48.

Once an agency is approved for and accepts United Way Community Priorities Funding for a program and/or service, it is subject to all United Way policies and procedures. Prior to its application, the agency should thoroughly review and be prepared to comply with United Way policies and procedures.

# Community Response Fund

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## **Purpose**

The Community Response Fund will support community partnerships, roundtables and collaborative initiatives to address important community issues that are aligned with UWPR's Priorities. Previous examples of initiatives that were supported by the Community Initiatives Fund, which was similar to this funding stream, were FairShare for Peel and 211.

## **Rationale**

"United Way involvement in partnerships/roundtables" is one of the seven steps, approved by the UWPR Board in support of the new Investment Strategy. In the past, this support has usually been in the form of in-kind contributions such as staff time, administrative support, and meeting space. There has been no formalized mechanism to facilitate UWPR's financial support of such initiatives. The lack of financial resources has severely hampered the effectiveness of some community-wide special initiatives, which are seldom eligible for other sources of funding.

The Community Response Fund creates a procedure and annual budget line to allow UWPR to provide some financial support to selected initiatives. This Fund is accessed through staff recommendation, not through a proposal review process.

Mechanisms will be implemented to measure the impact of UWPR's investment in community partnerships and results will be reported to the Community Investment Cabinet and Board on an annual basis.

## **Criteria:**

- Initiative must address one of UWPR's priorities
- UWPR must be actively involved in the initiative
- Funds can be used to:
  - Support the operations of the partnership
  - Implement a one-time project
  - Achieve a specific result

## **Allocation process:**

Funds for this stream will be allocated within the annual Community Investment Budget. Director of Community Investment recommends a grant to the initiative for recommendations under \$35,000, the Executive Director approves the recommendations from the Director of Community Investment, with allocations reported to the Community Investment Cabinet for information.

For recommendations over \$35,000, the Community Investment Cabinet approves the allocation. Once approved, allocations are reported to the Board of Directors for information.

Any expenditures in this funding stream will be reported in Community Investment and Management Reports to the Board and will be reflected in the financial statements. Expenditures will also be reported to the Community Investment Cabinet.

# Social Purpose Enterprise Grants

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The purpose of this grant is to develop an innovative poverty reduction investment strategy for individuals at risk by supporting existing social purpose enterprises in the following areas: business consulting, business planning and development, evaluation assessments, market research, marketing, financial planning and management, organizational and Board development. By adding this investment strategy United Way will be supporting the development of social purpose enterprises, leveraging existing supports and services and supporting ongoing research and evaluation.

For 2008/2009 a total of \$100,000 is available for distribution through this funding opportunity. \$75,000 has been allocated to support existing SPE work and \$25,000 is available to support organizations that are exploring the development of business activities for the dual purpose of generating revenue and furthering their mission.

# Neighbourhood Development Grants

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United Way of Peel Region launched this grant opportunity in 2007 to support the engagement of residents, community-based organizations, grass roots organizations, associations, businesses and other stakeholders towards the creation of resident activities, plans and priorities for how their neighbourhoods can be strengthened. Funds will strengthen resident-led leadership and actions through a series of quickly implemented projects addressing priority needs as identified by individual neighbourhoods.

This opportunity is to provide funding to neighbourhood development projects, identify learning's and outcomes from funded projects and to determine the feasibility of a longer term strategy.

Requests can range from \$500 to \$25,000. A total of \$150,000 is available for distribution through this funding opportunity.

# Strengthening Organizational Effectiveness Fund (SOEF)

## Purpose

The purpose of this grant program is to support organizational capacity building activities related to: business planning, evaluation, financial systems and process enhancement, board development, organizational assessment, human resources management, technology upgrades, communications and improved external relationships.

## Rationale

Research has shown that agencies rich in capacity are those with strong connections to their communities, good governance and effective management systems that enable them to fulfill their missions to better serve their communities. Support can and is provided through United Way's Strategic Transformations Program to the extent that a volunteer program can. It is recognized that these volunteer resources can provide only limited support. The SOEF program will go beyond these limits to provide professional expertise.

## Criteria

Projects must address capacity issues as outlined under the Purpose section above. Funding of up to \$20,000 per project can be allocated to human service organizations that have been delivering services for a minimum of two consecutive years and meet additional United Way funding criteria.

Funding support will be provided for time-limited activities that have an identified start date and completion date with clear outcomes and deliverables.

Budget items may include:

- Technical expertise
- Financial management processes and systems
- Information technology applications to improve service delivery and functioning
- Technical advice on communications systems
- Marketing plans
- Human Resource strategies
- Strategic Planning
- Program and service planning
- Board Development
- Deficit reduction strategies or resource development strategy/financial planning

- Operational policy development
- Coaching or professional support for the senior management team

Applicants will be required to complete a Capacity Building Self Assessment Tool and develop a Capacity Building Plan.

## Allocation Process

- Funds will be allocated within the annual Community Investment Budget and from additional monies provided through the Region Of Peel and other funders.
- The Peel Capacity Building Group will review Grant applications. This group is a partnership of funders representing United Way of Peel Region, Region of Peel, Ontario Trillium Foundation, Maytree Foundation and the Ontario Ministries of Citizenship and Immigration, Culture and Tourism and Recreation.
- Director of Community Investment recommends grants to the Executive Director based on the review by the Peel Capacity Builders Group.
- For recommendations up to \$35,000, the Executive Director approves the recommendations from the Director of Community Investment, with allocations reported to the Community Investment Cabinet and to the Board of Directors for information.

## Controls

- Any expenditure in this funding stream will be reported in Community Investment and Management Reports to the Board and will be reflected in the financial statements. Expenditures will also be reported to the Community Investment Cabinet.
- Funding agreements will be based on specific outcomes and deliverables to be achieved through each grant. Results based on these requirements will be reported to the Community Investment Cabinet and Board of Directors.

# Community Contingency Fund

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## Rationale

Provides grants, up to a limit established annually, where such financial support would preserve an already established and effective program/agency or provide access to a much larger benefit to the community. An agency will receive a one-time infusion of funds and cannot access the fund again for a period of five years. The agency must provide a full report on the use and results of the grant. The Contingency Fund does not address issues of agency mismanagement, but rather unforeseen or exceptional circumstances.

## Outcome

United Way is committed to ensuring that effective agencies are not compromised due to unforeseen situations. In addition, United Way is dedicated to ensuring quantitative and qualitative results for the following outcomes:

- With the infusion of monies from United Way, the agency should be able to effectively continue operation.
- The agency should have a developed plan of action with timelines to address their current financial situation.

## Eligibility

- Financial need has resulted from unforeseen opportunities or circumstances
- Outside the normal planning framework of the agency; assistance from United Way will provide a financial bridge to new solutions already identified and being planned / implemented by the agency;
- The applying agency must have a record of self sufficiency, good management and effective service delivery;
- The program is open to health and social service agencies in Peel which address United Way's Mission and Vision.

## Review Process

The Director of Community Investment will receive a written request from agencies. The Director will review the request for eligibility and any need for additional information. The approval process will be as follows:

- Director of Community Investment recommends a grant in the appropriate funding stream.
- For recommendations up to \$35,000, the Executive Director approves the recommendations from the Director of Community Investment, with allocations reported to the Community Investment Cabinet and the Board of Directors for information.
- For recommendations over \$35,000, the Community Investment Cabinet approves the allocation. Once approved, the allocations are reported to the Board of Directors for information.

If there are no monies available in the Fund, the Executive Director or Community Investment Cabinet, depending on the amount, can make a recommendation to the Board of Directors.

When funds are allocated to an agency but for whatever reason are returned or not disbursed, those monies are credited to the Community Contingency Fund. Funds not allocated in the current year will be held in the Community Contingency Fund for future years.

# Relationship between United Way and Funded Agencies

The relationship between United Way and funded agencies shall be based on the following Values and Principles.

## Statement of Values

1. The relationship is trusting; trust is achieved through open and constant communication and clear expectations.
2. The relationship is responsible; responsibility is achieved through mutual understanding and fulfilling of roles.
3. The relationship is respectful; respect is achieved through understanding and acceptance of agency expertise in serving their specific clientele.
4. The relationship is supportive; support is achieved through mutually determined goals derived through consultation.
5. The relationship is cooperative; a spirit of cooperation will allow the relationship to be both independent and interdependent.

## Statement of Principles

1. United Way is committed to the development of an agency-wide consultation process designed to facilitate the achievement of mutually held goals.
2. United Way is committed to work in cooperation with funded agencies in a manner that reflects both the independent nature of individual agencies and the interdependent nature of the partnership.
3. United Way is committed to seeking input in the development of policy related to human service needs in Peel. United Way is committed to ensuring that consultation with funded agencies in this regard is collaborative. It recognizes that the agency perspective on community needs is an essential element in the policy formulation process.
4. United Way has a public responsibility to be a good steward of the funds entrusted to it and must retain the ultimate responsibility for such funds.
5. Both United Way and funded agencies are required to practice and demonstrate sound management, planning and evaluation.

## Expectations and Responsibilities

United Way aims to foster a strong, positive relationship among funded agencies and between funded agencies and United Way in order to better achieve its mission of building the community.

## United Way will:

1. Maintain responsible management by a volunteer Board of Directors, who provide community representation from the Peel community served by United Way.
2. Annually conduct an effective fundraising Campaign to solicit charitable donations to support funded services.
3. Allocate funds in accordance with soundly established and accepted principles that address community needs and United Way's Mission.
4. Assist agencies by playing a leadership role in the support of health and human services issues in the community through consultation, training and collaboration.
5. Involve agencies in development of United Way policies and procedures.
6. Assist in promoting community understanding of the services funded agencies.
7. Make available its annual report and audited financial statement.
8. Recognize the obligations placed upon a funded agency by a provincial or national body under which it operates.
9. Clearly specify its policies and procedures to funded agencies
10. Seek the expertise of its funded agencies where appropriate.

United Way will not participate in negotiations between a funded agency and a bargaining unit.

## The Funded Agency is expected to:

1. Abide by United Way policies and procedures.
2. Use the funds as approved in the Citizen Review Process. The agency cannot redirect the funds without prior written request, consultation and written approval by United Way.
3. Provide assistance and information where possible to support Resource Development by United

Way. This includes conducting an agency United Way Campaign, attendance at Campaign events, participation in Speakers' Bureau, participating in Day of Caring, providing annual giving guides information, providing annual agency updates for agency directory, providing agency statistical information, provision of public displays, feature stories, photographs, use the United Way logo, etc. Funded agencies are encouraged to contact United Way Centraide Canada for purchase of such supplies <http://www.brymark.com/unitedway>.

4. Provide information by the date required and in such form as requested by United Way. This information shall include but not be limited to agency surveys, budgets, program descriptions and data, and the complete audited financial statements.
5. Use appropriate wording and/or United Way logo in compliance with United Way's sub-license document, on all printed materials, web sites and displays, and in all publicity, including all public presentations and have United Way signage in the agency's office. This is to ensure that the public is aware of and understands how United Way dollars are being used in the community.
6. Participate when possible in United Way activities such as consultations, committees, task forces, annual general meeting, and provide material for United Way newsletters, etc.
7. Notify United Way in writing prior to the expansion or termination of existing services or prior to the implementation of new services, in order to ensure United Way's understanding of available community services and to facilitate coordinated planning.
8. Inform United Way immediately in writing of any significant organizational changes including senior leadership changes (Executive Director, Board Chair, Senior Staff), financial governance and programming issues.

### **Non-Monetary Resources**

United Way is able to provide resources beyond financial investment, which it does primarily through the sharing of services, facilities, information, and expertise. Similarly, funded agencies have resources upon which United Way

may call on for year-round public awareness and support during Campaign.

Examples of non-monetary resources, which agencies might request from United Way (some may have fees attached) include:

- assistance from Strategic Transformations Program, including management assistance and strategic and long-range planning
- consultation on public relations and communications
- resources in human resource management (policies, job descriptions, salary ranges, hiring practices)
- assistance in the preparation of briefs, task force reports or other forms of public education on legislative issues
- coordination of access to the range of programs and services provided by United Way/Centraide Canada
- coordination, advice and assistance with planning approved agency fundraising activities
- access to United Way mailing lists, excluding donor lists
- access to donations-in-kind, e.g. office supplies, furniture, computer software.

Examples of non-monetary resources, which United Way might request from funded agencies, include:

- the participation of designated staff or volunteers on United Way committees
- the use of agency space for board meetings or workshops
- access to agency newsletters or publications
- the use of equipment, vehicles or facilities
- the provision of account representatives during Campaign
- the placement of the United Way logo on agency property
- the provision of staff training, in-service workshops or specific consultation for other agencies.

Agencies should note that these requested resources are in addition to the agency relations and Campaign activities expected of all funded agencies and described in this Manual.

# General Funding Policies

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## Funding Agreement

A Funding Agreement is a contract between United Way and a funded agency. In signing the Agreement the agency commits to honouring United Way's policies and expectations of outcomes to be achieved by the agency. The Agreement will include the following elements:

- Amount of United Way's Funding And Expected Outcomes
- Funding Term
- Request For Additional Funding / Re-Opening
- Approved Use Of Funding
- Accountability Reports
- Citizen Review Report, as applicable

The President/Chairperson of the Agency Board of Directors and Board Chair of United Way must sign the Funding Agreement. The Funding Agreement must be returned to United Way by the noted deadline. Failure to fulfill these conditions will result in suspension or termination of funds.

## Payment of Allocation

Unless specified otherwise, the approved allocation shall be dispensed in twelve equal monthly installments. With justification, the United Way Board may authorize an advance of up to three (3) months, if funds are available. The approved allocation shall be paid in full, except where, after discussion, significant changes in the circumstances of United Way or the funded agency indicate otherwise.

## Collaboratives

United Way responds to the needs of collaboratives through its Community Response Fund and Strengthening Organizational Effectiveness Fund. To enable the process, collaboratives must have a registered charity as lead agency. Agency / Collaboratives must be already established and functioning with demonstrated success. All members of collaboratives are expected to adhere to United Way's stated Values and Principles.

### *Lead Agency Roles and Responsibilities:*

- The lead agency must meet the Eligibility Criteria For Funding.
- The Board of Directors of the lead agency must agree to accept funds in trust for the approved project. The lead agency agrees to release funds to the collaborative according to an established

payment schedule.

- Unless otherwise authorized by United Way, funds must be spent as specified in the Funding Agreement.
- The lead agency is financially accountable to United Way for all funds received. Upon project completion, the lead agency's audited financial statement must be provided to United Way, clearly identifying the flow of United Way funding for the project.
- The lead agency is ultimately accountable for project implementation and outcomes.
- The lead agency must provide United Way with reports demonstrating progress related to stated outcomes. The reporting schedule will be outlined in the Funding Agreement.
- The lead agency must provide United Way with financial reports detailing the effective and appropriate use of funds as approved in the Funding Agreement. The reporting schedule will be outlined in the Funding Agreement.

### *Essentials Of A Partnership Agreement In A Collaborative*

Partnership Agreements must include the following:

- Specified roles and responsibilities for members of the collaborative and the lead agency must be clearly identified.
- A documented plan for successful project management and implementation.
- Agreed upon project outcomes and appropriate measurement tools.
- A conflict resolution process.

### *Compliance With United Way Policies*

- Collaboratives must comply with United Way Policies as they pertain to the funded project including use of United Way logo and the fundraising policy.

## Head Office Payments

United Way recognizes the agency's obligations to meet reasonable dues or payments to national, provincial or parent organizations.

## National Agencies

National or provincial organizations, which receive head office payments from agencies funded by United Way, will not be eligible for direct United Way funding. Services provided by the national or provincial organization to local residents will be funded through the United Way's funding of its local branch.

## Administration Costs

### *Purpose*

United Way funds can be used to support administration costs. A flexible portion of program costs will be allowed for allocation to central agency administrative costs such as senior agency management, human resources, financial services and other administrative infrastructure.

Examples of core administrative costs include the following

- salaries/benefits of staff who spend time on work that is not directly related to a program, such as executive directors, managers, coordinators, bookkeepers, clerical staff, receptionists or maintenance workers. Costs can be prorated accordingly for staff who spend a portion of their time on programs and administration.
- a portion of building occupancy costs not directly related to a program
- a portion of office expenses not directly related to a program
- advertising costs for recruiting staff and general advertising
- promotion and publicity not related to program outreach
- purchased professional services that are not client related, for example: legal fees, audit or bookkeeping fees, costs to develop or maintain information services
- association/membership dues
- liability insurance y postage, courier, telephone
- annual meeting, annual report
- general office expenses not directly attributed to program

United Way funds cannot be used to support the following:

- special events such as tournaments, conferences, receptions, festivals, and parties
- legal challenges, costs and settlements
- costs related to fundraising or productive enterprises (marketing, staff, materials)
- mortgage costs

## Agency Surplus and Deficit

### *Purpose*

United Way has a public responsibility to be a good steward of the monies entrusted to it by donors. In order to fulfill this responsibility, United Way must ensure that its funds are being used in the most effective and prudent manner to provide needed services to the community. This policy is intended to provide direction for an agency in its financial planning and to assist United Way in its evaluation of an agency's financial status.

### *Surplus*

An operating surplus represents an excess of funds received over expenditures incurred by an agency during the fiscal year.

This could result from the reduction of expenses or funds being received in excess of budget. It could also result when a budgeted expenditure is postponed from one year to the next. If an agency does not disburse in its fiscal year the funds it has been allocated for approved expenses in the program or programs for which United Way funding has been approved, the agency shall notify United Way in writing no later than twenty (20) days after the end of the fiscal year of the agency of the amount that has not been spent. United Way funds are to be used for operating expenses. Unless an agreement is made with United Way no later than thirty (30) days after the end of the agency's fiscal year, funds allocated by United Way and not spent on approved program expenses shall be repaid to United Way.

Returned funds will be re-invested into the community through funding streams based on United Way's priorities and emerging needs.

### *Deficit*

A deficit represents an excess of expenditures incurred over funds received in a particular program or activity during a fiscal year. United Way will not provide funds to cover a deficit. In its stewardship role, United Way is concerned with the viability of funded agencies. In order to fulfill this responsibility, United Way will give close scrutiny to the causes, results, and management of a significant or recurring deficit.

### *Implementation of Policy*

Because of the inherent complexities of budget issues and the distinct financial status of each funded agency, it is understood that discussions regarding surplus and deficit may need to occur beyond the normal community investment process in order to ensure a clear understanding of the causes, results and management of the situation. An agency should inform United Way staff at any time during the year if a surplus or deficit that was not anticipated becomes evident.

### **Reserve**

A reserve (also known as an accumulated surplus) is the total of surpluses retained over a number of years.

United Way recognizes the funding challenges facing many community-based agencies. Many agencies have not been able to maintain any meaningful financial “cushion” or “reserve” to buffer the effect of unexpected funding shortfalls or expenditure increases. That United Way should not be contributing to the development of a surplus or reserve fund when there are unmet needs in the community for which funds are not available.

When assessing an agency’s reserves, United Way will consider the following:

- That each agency should practice responsible financial management. This means that some level of financial reserve will be encouraged, not discouraged.
- That each agency should be able to maintain a non-restricted reserve to deal with a potential financial crisis.
- That each agency should be encouraged to have non-restricted reserve funds up to four months of their operating budget, including bequests etc.

- Unless a particular type of revenue is externally restricted for special purposes, all revenue is considered to be part of operations and consequently the changes in reserve that arise from that revenue are part of the operating surplus. A board decision to segregate part of the reserve for specific projects is an internal restriction that has no impact on operating surplus; hence, internally segregated reserve is included in the overall operating surplus for the purpose of the policy. In certain cases, such as a contribution to the equipment replacement reserve component of a capital fund, a reserve transfer is deemed to be reasonable and is acceptable under the current reserve policy guidelines.

In assessing an agency’s financial position, the following factors will be considered:

- Ratio to annual operating budget
- Reliability of the sources of funding (the greater the uncertainty of funds from a particular source, the greater the need for an adequate accumulated reserve to be maintained)
- Intended use of the accumulated reserve (operating deficits; postponed expenditures; repair/renewal of fixed assets; capital expansion; contingencies; etc.).
- Agency must specify accumulated reserve versus liabilities in order to assess reasonableness.
- Rate of growth of an accumulated reserve. (Interest on a designated accumulated reserve normally is credited to that fund.)
- Past use of an accumulated reserve.
- Percentage of the agency’s revenue provided by United Way funding.

In cases where the agency’s non-restricted reserve funds exceeds four (4) months of its operating budget, United Way will consider whether:

- The agency can demonstrate an intended use that will bring the fund below the designated limit in the fiscal year being funded.
- The agency can demonstrate an exceptional circumstance that necessitates the maintenance of a reserve fund in excess of the 4-month limit.

In the event that an agency cannot justify satisfactorily to United Way the reason for reserve funds in excess of the suggested amounts, United Way reserves the right to terminate funding to the agency.

### **Audited Financial Statements**

The audits of funded agencies must be prepared according to generally accepted accounting principles. Agencies are encouraged to use the accrual method of accounting which records revenue when earned and expenditures when incurred. If possible, the audited financial statement should parallel the format of the budget submitted to United Way. The audited financial statement should specifically identify the amount of funding received from United Way. It is recognized that the contributions of United Way may not be easily identified in the audited report of provincial or national organizations, but should be identifiable on the local year-end statement.

Management letters from an auditor must be submitted immediately to United Way. The agency should also submit a plan to address the issues identified in the management letter.

The agency must forward most recent audited financial statement to United Way with its completed funding application. Audited statements must be sent to United Way within six (6) months of the agency's fiscal year-end. United Way must receive the complete statement of operations and statement of financial position related to United Way funded and non-funded programs.

### **Campaign Coverage and Shortfalls**

In the event that the annual Campaign exceeds or does not meet the amount tentatively approved for community investment, United Way will undertake a review of the community plan. The final decision resides with the United Way Board of Directors.

### **Emergency Requests**

See Community Contingency Fund.

### **Terminating Funding**

#### *Rationale:*

To meet its stewardship obligations to its donors and the community it serves, United Way must continuously assess its community investment priorities, expected outcomes, criteria and guidelines to ensure that its resources are directed towards the community's most urgent needs. All existing and future funding commitments must be measured against these criteria. Every effort will be made to resolve differences before formal termination procedures are implemented. In the event that funded services and programs do not meet the priorities and criteria for funding, the Citizen Review Volunteers are charged with recommending terminating United Way funding.

The following guidelines provide a more detailed format for terminating funding:

- Concerns about United Way funded service or program will be raised during the annual Citizen Review Process. Remedial action required will be clearly articulated in the Citizen Review Report. The report will state that failure to resolve the concerns or issues with United Way may result in termination of funding. The report is sent to the Executive Director and Board Chair. The accompanying letter will request a meeting between Citizen Review Volunteers and agency volunteers within 30 days of notification to clarify the issues and determine a process for addressing them within the first six months of the funding year or the timeline as specified in the Citizen Review Report. The meeting, and any subsequent meetings, may include United Way staff to provide support at the discretion of both parties.
- When the concerns are resolved and/or a plan of action is implemented, the agency will be permitted to participate in the next funding cycle.
- The concerns must be sufficiently addressed by August 31 of the new funding year. If there is no resolution, Citizen Review Volunteers may recommend to United Way Board of Directors that funding for the program or service be terminated.
- Agencies must be informed of the Board decision by September 30, allowing them a termination period of no less than six months. Citizen Review

Volunteers may recommend a longer termination period to enable the agency to manage issues such as occupancy, staffing commitments and finding alternate funding sources.

- The agency agrees that if human rights issues are raised, proof of compliance lies with the agency. If the outcome of a finding by the Human Right's tribunal suggests that the agency is in violation and if United Way is certain that the agency will not take immediate action to address the violation, then this failure to comply with this provision shall be the cause for immediate termination of the Community Investment Funding Agreement.
- In cases of fraud, United Way reserves the right to pursue the matter to the full extent of the law.
- A history of a terminated funding will be taken into account when assessing and approving future funding applications from the agency, should the agency reapply for United Way funding.
- United Way may terminate or reduce funding effective immediately in cases where need for United Way dollars is not demonstrated and/or there has been a breach of United Way policy, where wrong-doing is investigated and confirmed, or where there is a significant campaign shortfall.

### **Dissolution of an Agency**

Should the agency be dissolved or cease to function, the agency must submit an accounting for all United Way expended and unexpended funds. Capital assets funded by United Way must be returned to United Way.

### **Organizational Review**

#### *Purpose*

United Way may from time to time undertake an operational review of a member agency to evaluate its eligibility for continued funding and/or the level of funding. The review is intended to give a clear picture of the agency's role in the community, its strengths and weaknesses and to provide guidance for changes.

The decision to initiate an operational review is made by Community Investment Cabinet. United Way may recommend such a review in the following circumstances:

- a. An agency appears to be falling seriously short of meeting the eligibility criteria for funding; or
- b. There is a perceived weakness in one or more major areas within the agency; or
- c. The team is unclear about how the agency operates (e.g. financial reporting, program activities, relationship to other related agencies).

#### *Procedure*

A review team comprised of at least 3 volunteers with appropriate skills, along with United Way staff, conduct an operational review. Community Investment Cabinet appoints the Chair of the review team. Generally, the team should include at least one representative from Community Investment Cabinet, individuals with financial expertise, knowledge of the field of service and expertise in any identified problem area.

Whenever possible, reviews are intended to be carried out over a 2 - 3 month period. Reviews may cover an agency's structure, finances, services, programs, staffing and continued funding eligibility. Interviews may be conducted with key people within the agency as well as in the community.

The review team consults with the agency undergoing the review at appropriate points during the review to enable the agency to comment on: composition of the team, terms of reference, scope of the review; individuals/ agencies to be interviewed; and preliminary recommendations.

#### *Report*

The review team presents the final report of the operational review to the agency's Board of Directors and to Community Investment Cabinet. Community Investment Cabinet considers the operational review team's report and presents recommendations for remedial action to United Way's Board of Directors for approval.

#### *Implementation*

The agency is responsible for the implementation of recommendations within specified timelines made by the operational review team. Community Investment Cabinet monitors the progress of the agency. In cases

where the operational review raises the issues of funding levels and/or of continued funding, it is the responsibility of Community Investment Cabinet to recommend appropriate action to United Way's Board of Directors.

The following terms of reference may be modified and adapted to suit the individual agency:

- Objectives of Review
- Issues/Concerns
- United Way concerns
- Citizen Review Team evaluation y
- Review Team
- List of members

#### *Scope of Review*

- A review of the mission statement in light of current programs and community needs
- Service analysis - a review of current programs and the process of program planning and evaluation
- Human resource analysis - a review of current volunteer and staff composition and use, including a review of Board structure and responsibilities
- Management - a review of the effectiveness of agency planning, organizing, directing and monitoring including Board/Staff relationships and decision-making processes
- Financial analysis - a review of performance in relation to budgeting procedures and policies, financial management and financial planning.
- Need for United Way dollars
- Funding level (if applicable)
- Identification of Participants
- Individuals/ agencies to be interviewed
- Locations to be visited
- Timeframe/Work Plan
- Agency Input
- Consultation timetable
- Reporting Procedures
- Reporting timetable
- Appeal

#### **Conflict of Interest**

A Citizen Review Volunteer affiliated with an agency being reviewed for United Way funding shall declare the conflict of interest and not participate during discussions of, or decision-making on, that agency's funding.

#### **Appeals**

An agency can appeal a funding decision if it can show a substantial error in process or misunderstanding of information.

#### **Process**

Within 30 days of receiving its funding decision in writing, the agency shall send written notification to the United Way of its intent to appeal, and on what grounds. Within four weeks, the request for appeal shall be considered by the Appeals Committee to determine its eligibility.

Within four weeks of eligibility being determined, the Appeals Committee shall meet with representatives of the agency and with the Citizen Review Team Leader and Community Investment Cabinet Chair to hear the case for new recommendations. The Appeals Committee may request additional information from other relevant sources.

The Appeals Committee shall forward its recommendations to the next meeting of United Way's Board of Directors. The ruling of the board, in the matter of appeals, is final.

#### **Appeals Committee**

The United Way Board of Directors shall appoint an Appeals Committee. The Appeals Committee shall be chaired by a United Way Board Member, and shall include one community member and one former president/chairperson of a funded agency, not already involved in volunteering for United Way.

## **Complaints**

It is not the role of United Way to mediate or resolve conflicts between a complainant and a funded agency. United Way will make the agency aware of any complaint brought to its attention. United Way funded agencies are expected to have grievance/complaints policies and procedures in place to address potential concerns from clients, staff, volunteers and other relevant stakeholders. The role of United Way in receiving a complaint against a funded agency is to ensure United Way's funds are not being mismanaged (or are not at risk of mismanagement) and that service delivery to the community is not compromised (or at risk of being compromised). The assessment of a complaint on both matters is made using United Way's eligibility and performance criteria. If United Way is concerned about mismanagement of funds or compromised services, it will investigate further.

United Way will seek assurances that the agency is aware of the complaint and determine that the agency has made the complainant aware of the agency's grievance or complaints process.

# Fundraising Policy for Funded Agencies

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## Purpose

United Way is committed to community-building by ensuring a holistic, comprehensive network of services in Peel Region. Annually, United Way conducts a workplace Campaign to solicit charitable donations. The Campaign generates critical resources to support United Way's community investment strategies.

United Way's funded agencies - key partners in achieving United Way's mission - must have a strong commitment to protect and enhance the United Way campaign. When an agency accepts funding from United Way, it enters into a collaborative endeavour, agreeing to safeguard United Way's capacity to access and leverage resources on behalf of many agencies. Any supplementary fundraising activities conducted by funded agencies must be designed so as to not be detrimental to United Way's Campaign.

This policy is intended to support successful fundraising and community-building for both United Way and its funded agencies.

This policy imposes the following conditions on fundraising activities of funded agencies:

1. Agencies may not conduct fundraising activities during United Way's annual Campaign period (hereafter referred to as "the Campaign") defined as September 1 to December 1 (it should be noted that United Way's campaign operates until December 31). Fundraising activities are defined as:
  - Corporate donations/sponsorships
  - Requests for gifts-in-kind in excess of \$1,000
  - Telemarketing campaigns (except as described below)
  - Direct mail acquisition campaigns (except as described below)
  - The launch of capital campaigns
  - The public sale of products/merchandise
  - Any revenue generation activity with a net gain for the agency.
2. Agencies may not approach United Way corporate partners for donations or sponsorship during the Campaign. The United Way Corporate Partners List will be issued to funded agencies annually. The list will be updated and re-issued as necessary. Corporate partners may request that agencies refrain from approaching them for donations or sponsorship year-round. Where applicable, this will be noted on the Corporate Partners List.
3. Agencies funded by United Way may not establish or conduct an external workplace (employee) campaign at any time. Workplace campaign activities include those where an employer has enabled a funded agency access to a workplace to solicit charitable donations from employees.
4. Agencies may conduct the following fundraising activities during the Campaign:
  - Direct mail campaigns to "friends of (the agency)" as defined below.
  - Requests for funding to service clubs, foundations (with the exception of corporate foundations on United Way's Corporate Partners List), faith organizations and other granting organizations.
  - Internal sale of products/merchandise
  - "Third party events", defined by United Way as activities where an agency is receiving revenue from an event initiated and run by a third party but is not involved in planning, promoting, seeking sponsorship, selling tickets or managing any aspect of the event.
5. No public fundraising events can be conducted during the Campaign with the exception of those on United Way's approved "grandfathered" events list. For such grandfathered events:
  - All materials related to the event must identify the agency as a United Way funded agency.
  - Corporations or workplaces on the United Way Corporate Partners List must not be solicited for donations, sponsorships or event participation.

- The event must not take place on the same day as United Way's major public events such as Campaign kick-off, Days of Caring, golf tournament, Final Achievement event and annual general meeting. Dates for these events will be communicated to agencies a minimum of 3 months prior to the events.

As part of the annual funding application, agencies will be asked to submit an annual fundraising plan outlining all fundraising activities planned by the agency. United Way is to be notified in writing of any changes that occur to this plan during the course of the year.

### **National or Provincial Organizations and Affiliated Foundations**

Funded agencies are responsible for ensuring that all fundraising conducted by their affiliated organizations, including provincial and national organizations and foundations affiliated with the funded agency, which involve solicitations in Peel Region, are conducted in accordance with this policy.

### **United Way Campaign by Funded Agencies**

Funded agencies must conduct an in-house campaign for donations to United Way's Campaign. Through their own workplace campaigns, agencies are encouraged to support the United Way Community Fund, as a show of support for the broad range of services required to create and sustain a healthy community. Agency staff members are prohibited from directing their United Way donation back to their own agency during United Way's Campaign.

### **Direct Mail/Telemarketing/Email Marketing**

Agencies may solicit through direct mail/telemarketing campaigns provided it is not done during the Campaign period, and that such mailing/telemarketing initiatives are not made to individuals at their place of work or to corporate and business donors on the United Way corporate partners list.

An agency can conduct direct mail renewals to "friends of (agency)". "Friends of" means a small, select group, such as past or current board members, very active volunteers

and other individuals who have a special connection to the agency.

### **Use of United Way Logo**

All literature and print materials must identify the agency as a United Way funded agency. Agency fundraising activities where United Way's logo is being used must be approved prior to proceeding with the event. This includes third party initiatives that are being organized to solicit or receive funds on behalf of United Way. (Policy change to be approved by UWPR Board of Directors on October 1, 2008)

### **Ethics**

All fundraising activities, whether done directly by the agency, through third party vendors or consultants, are expected to use ethical fundraising methods. The Ethical Fundraising and Financial Accountability Code of Imagine Canada (formerly The Centre for Philanthropy) is recommended as a guide. The Charities Directorate of the Canada Revenue Agency also provides information about expectations of charities.

### **Application to other United Way Jurisdictions**

Funded agencies with plans to initiate fundraising activity are to adhere to fundraising guidelines in other United Way jurisdictions, as applicable.

### **Breach of Policy**

Breaches of this policy will result in progressive corrective action. This may include one or more of the following steps:

- an inquiry by United Way about the circumstances of the breach
- a meeting with agency representatives
- written notice of the breach to the agency
- a report regarding the breach to United Way's Community Investment Cabinet and Board of Directors
- possible reduction in the agency's United Way funding
- possible termination of the agency's United Way funding.

### **Questions**

Agencies are encouraged to address any questions or requests for clarification regarding this policy to a Community Investment staff member.





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