

Community Investment Grant Application Instructions

(2025-2026 funding cycle)

To apply for funding, you must:

* **Submit the Notice of Intent to Apply no later than close of business on March 10, 2025.** (Notice of Intent to Apply link: <https://form.jotform.com/250376216004144>)
* **Have an organizational representative attend at least one Applicant Workshop.**  
   [**TEAMS link for February 27th at 1 pm**](https://teams.microsoft.com/l/meetup-join/19%3ameeting_MWM0MTdlOTYtOTlmYy00NmE0LTg1MzItOGQ3Y2MzZjg0M2M5%40thread.v2/0?context=%7b%22Tid%22%3a%222d8047dc-7b26-4fcd-ba45-92442771ec3a%22%2c%22Oid%22%3a%226c49fdf4-7bca-41b3-be0c-3f1bf4d03256%22%7d) [**TEAMS link for February 28th at 10 am**](https://teams.microsoft.com/l/meetup-join/19%3ameeting_MzhlNzY2OGItNzhkMi00YzQ4LWIxNGMtZDNjOGM2NzZiZjU3%40thread.v2/0?context=%7b%22Tid%22%3a%222d8047dc-7b26-4fcd-ba45-92442771ec3a%22%2c%22Oid%22%3a%226c49fdf4-7bca-41b3-be0c-3f1bf4d03256%22%7d)
* **Submit** the following application items and attachments ***no later than 5 pm on Monday, March 24, 2025:*** **(You will use a unique upload link sent to your organization contact upon submitting your Notice of Intent to Apply by 3/10/25)**

1.) 2025-2026 Community Investment Grant Application (download from website)

2.) 2025-2026 Applicant Financial Data Workbook (download from website)

3.) Attachments:

A1.) Completed signature page (download from website)

A2.) Recently completed audit

A3.) 990 for most recently completed fiscal year

A4.) Current Board of Directors roster

***Additional Instructions:***

# Notice of Intent to Apply – Last day to submit: March 10, 2025

The link takes you to a brief survey with questions that will help us understand who is applying, in what area, and at what amount. It will also help determine if your organization meets the requirements for funding consideration before you get too far into the application process. We encourage you to submit this as soon as possible; we will respond within two (2) business days if there is a perceived issue with your eligibility to apply.

You will need to attach your IRS 501(c)(3) Designation letter if you are a new grantee, and answer questions concerning audits and policies. Please be prepared as you cannot save your work at this link.

# Community Investment Grant Application

***Section 1 – Organization Information***

This section is all Organizational information.

The Operating Budget should reflect your current fiscal year budget, for the full organization.

***Section 2 – Contact Information***

If your Executive Director is also the person we should contact in reference to the application and grant process, you can leave the Grant Contact information blank. The Executive Director information is required, either way.

***Section 3 – Program Information***

This section is background information on the specific program within your organization for which you are seeking funding. While we will ask for details later in the application, please keep in mind that United Way is funding something specific within your organization. While it may be general operating, it is general operating in support of something. If you would like help clarifying, please reach out no later than March 14th to bethany@unitedwaycrossroads.org to schedule a technical assistance call.

***Section 4 – Funding Priority Area***

This is program-specific. We will discuss the Impact Areas in more detail during the Applicant Workshops. You will have to settle on asking for funding for ONE of the Impact Areas.

**Program Narrative**

*Sections P1-P6*

These sections are Program-specific. The questions are detailed with additional information beneath many of the response boxes. We will have an open Q&A time specific to this section during the Applicant Workshops but welcome questions thru March 14th at bethany@unitedwaycrossroads.org. Please know that those questions and answers may be used to create a FAQ that will be shared on the website.

*Section P7*

Complete the **P7 - Stats and Unit Cost** tab in the *25-26 Applicant Financial Data Workbook*.

The Service Statistics and Demographics are Program-Specific. If you are a 24/25 Grantee who completed your Indicator data, you only need to complete the Projected column.

# Budget – 25/26 Applicant Financial Data Workbook

Note throughout workbook: we understand that not everyone’s fiscal year will be complete at time of application. So, we know that 24/25 Actuals may actually be 24/25 Estimated. We should be able to tell this by your fiscal year, but we will reach out individually with questions, as needed.

***Section B1 – Program Budget***

Complete the B1-Program Budget tab in the 25-26 Applicant Financial Data Workbook.

This tab is all Program-Specific. The Expenses section includes a line item that is not included in the organizational budget  Administrative Costs. This is intended to include allocated amounts of nonprogram staff and related costs for those positions (FICA, benefits, workers comp, etc).

If you include an amount in Other Expenses or Other Income, you MUST complete the Explanation at bottom of page. Also, In-Kind Revenue and In-Kind Expenses should always match.

***Section B2 – Organizational Budget***

Complete the B2-Org Budget tab in the 25-26 Applicant Financial Data Workbook. This tab reflects financial data for the full Organization.

Reminder, if you include an amount in Other Expenses or Other Income, you MUST complete the Explanation at bottom of page. Again, In-Kind Revenue and In-Kind Expenses should always match. Lastly, please explain Excess or Deficit, as needed, in the space given.

***Section B3 – Historical Information***

Complete the B3-Org Historical & Overhead tab in the 25-26 Applicant Financial Data Workbook. This tab is reflective of the full Organization and will help our reviewers better understand the financial health of your organization. You will need your Audit and your 990 to complete this tab. The line items are general to most audits, but if you run into an issue, please reach out no later than March 14th to bethany@unitedwaycrossroads.org to schedule a technical assistance call.

Website: [www.unitedwaycrossroads.org](http://www.unitedwaycrossroads.org)

Email for questions: bethany@unitedwaycrossroads.org