
MEMO

TO: AGENCIES APPLYING FOR FUNDING FROM CITY OF ASHLAND, CITY OF MEDFORD,
UNITED WAY OF JACKSON COUNTY

SUBJECT: 2019-21 FUNDING APPLICATION

DATE: JANUARY 2, 2019

**DUE DATES: MARCH 5, 2019 UNITED WAY;
MARCH 5, 2019 AT 4:30 PM, CITY OF ASHLAND;
TBA, CITY OF MEDFORD.**

*The above three funders use common forms for the upcoming 2 year funding cycle. Though the forms are the same, **the grants are not connected in any way through the cities or United Way.** We hope the common form makes the best use of applicant's time and resources. Enclosed are application materials and information regarding requirements. **The City of Medford application due date will be announced later in the year.***

Application available online www.UnitedWayofJacksonCounty.org/OurPartners/AgencyFunding/.

Funder Contact, Submission Specifications and Due Date

City of Ashland – Provide 1 original, signed, unbound application and 1 electronic PDF copy.

DEADLINE: March 5, 2019 at 4:30 pm.

Email Electronic version to **Linda Reid**, reidl@ashland.or.us (phone (541) 552-2043) **AND**
Deliver one hard copy to Ashland, 20 East Main Street, Ashland OR 97520

Note: Ashland funding cycle is two years.

Community Development Block Grant funding is a separate application process. Please contact Linda for more information on the CDBG.

Ashland does not require completion of a logic model or submission of an audit.

City of Medford – Notice will be posted on the website at cityofmedford.org and emailed when the City is accepting applications.

DEADLINE: TBA

Please provide your agency contact information to Angela.Durant@cityofmedford.org or call (541) 774-2390 to receive emailed notification of General Fund Grant availability and application instructions upon City Council's funding approval.

CDBG - Community Development Block Grant funding is a separate application process.

United Way – Provide one original, signed, certified, and unbound application **AND** one electronic PDF copy.

DEADLINE: March 5, 2019 – electronic copy by midnight on March 5; hard copy postmarked no later than March 5 or hand delivered by 4:30 pm on March 5 to 60 Hawthorne Street, Medford Oregon 97504.

Call or email with questions: 541-773-5339

Jan Sanderson Taylor, jan@unitedwayofjacksoncounty.org

Talia Matthias, talia@unitedwayofjacksoncounty.org

Funding Definitions and Minimum Requirements – READ CAREFULLY

CITY OF ASHLAND

The City of Ashland is now accepting grant applications for Social Services funding for fiscal year 2019-20 and fiscal year 2020-21 (July through June). **Note: The funding cycle is two years.** Social Services grant money is funded through the General Fund. It is estimated that approximately \$135,000 each year will be available for distribution. Grant recipients may receive an inflationary increase on the awarded amount for the second year of the grant.

The City of Ashland Housing and Human Services Commission **will review the grant requests in April** and make a recommendation for grant awards to the City Council. Subsequently, the City Council will hold a public hearing in June 2019 to adopt the 2019-2020 Biennial Budget (which would include these awards) and make the final decision on grant awards.

Printed copies of grant applications and instructions are available from the Front Counter at the City of Ashland, 20 East Main St, Ashland OR 97520. They are also available via email or at the City's website www.ashland.or.us in the Administrative Services Department.

Applications are due to the City of Ashland **no later than 4:30p.m. on March 5, 2019.** Please submit one (1) hard signed copy to the City of Ashland, 20 East Main St, Ashland OR 97520 and one (1) electronic PDF copy to linda.reid@ashland.or.us.

Late and/or incomplete applications will be rejected as ineligible.

In addition, an oral presentation, schedule to be announced, will take place.

- For questions regarding application status, where to send applications, due dates etc. and to determine if your business may qualify to receive funding, and for more information regarding eligibility and requirements, please contact Linda Reid, Housing Program Specialist 541-552-2043 or email linda.reid@ashland.or.us.
- An additional source of grant application information is: <http://www.ashland.or.us/Page.asp?NavID=15304>.

UNITED WAY OF JACKSON COUNTY

Funding Cycle: two year Cycle July 1, 2019 through June 30, 2021 – second year renewal based on satisfactory reporting and funding availability.

- Applications available on January 2, 2019.
- Applications are due March 5, 2019.
- Site visits take place during the month of April 2019.
- Funding decisions finalized on May 29, 2019 for the first year of funding and May 27, 2020 for the second year of the cycle (renewal application not required for second year of funding).
- Grant agreements/renewals issued first week of June in 2019 and 2020. Due June 30, 2019.
- Anti-terrorism certification and bank account information due in mid-June each year of cycle. Receipt of funding awarded is contingent upon receipt of completed forms.

Clarifications:

Funding awarded ONLY to programs that contribute to one or more IMPACTS:

- **Education** – increase high school completion;
- **Income** – family stabilization and independence;
- **Health** – maximize wellness;
- **Transportation** – remove barriers to getting to work, to school and to needed appointments.

Our Belief: At its core, United Way of Jackson County believes people are connected and interdependent. When we reach out a hand to one, we influence the condition of all. We all win

when a child forms healthy attachments through a loving family, when they succeed in school, graduate and make a successful transition to adult responsibilities. We all win when families are financially stable, when people have good health, and when people are engaged and connected. We all win when people have transportation to pursue education, access medical services and work. Through our role as convener, facilitator and advocate, our goal is to create long lasting change by addressing the underlying causes of problems. This belief forms the foundation for our strategies for education, income, health and transportation.

United Way Minimum Requirements:

Requirements policy superseding any previously approved minimum requirements:

- Be a 501(c) (3) organization or other tax exempt organization in place for a minimum of two years.
- Be governed by a board of directors or an independent governing body.
- Have tax exempt status in effect for two years prior to application to United Way.
- Have a paid executive director or the demonstrated capacity for evaluation of continuity, responsibility and accountability.
- Be primarily involved in providing programs that are education, personal financial stability, health or transportation related that directly serve Jackson County, OR and surrounding areas residents' and employers'.
- Maintain policies and practices for the protection and safety of vulnerable populations (children, people with disabilities and seniors) served by funded program.
- Maintain a nondiscrimination policy or plan that does not discriminate on the basis of race, color, creed, religion, gender, national origin, age, marital status, Veteran status, sexual orientation or status as a person with disabilities.

Additional information available on website: UnitedWayofJacksonCounty.org

CITY OF MEDFORD

Funding Cycle: One to two year cycle

Requirements:

The Medford City Council adopted Medford Municipal Code 2.441 in June 2018 establishing a Medford Community Development Grants Commission that shall administer the City's General Fund Grant program. Specific requirements of the General Fund Grant program are currently under review by the Commission and will be presented to City Council for approval prior to Notice of Funding Availability.

Minimum Requirements: 501(c) (3) or other tax-exempt organization

Late and/or incomplete applications will be rejected as ineligible.

Additional information available on website during application process: cityofmedford.org

Application Outline

Electronic submission is required, in addition to hand delivered or mailed application (see funder for number of copies required) which must be postmarked by the due date to receive consideration by funders. Late and incomplete applications will be rejected.

The City of Ashland due date is March 5, 2019.

United Way due date: March 5, 2019.

The City of Medford: will announce due date later in the year – to be received by that date only.

Contact information for each funder is detailed in the cover memo. Use 11 point Times New Roman font. Do not extend narrative section responses beyond the space provided, including questions. Electronic format submissions must be in fillable application form.

Check List

- _____ Title / Certification (Submitted original **must have original signatures of the executive director and board president.**)
- _____ Summary (pages 1 and 2)
- _____ Three narrative questions (pages 3 and 4)
- _____ General financial information (page 5)
- _____ Organization annual budget for 2019-20 on provided forms (page 6)
- _____ Project/Program annual budgets on provided forms (pages 7 and 8)
- _____ Most recently completed year's Client Demographic Profile on provided form (page 9).
- _____ Agency Board Demographic Profile on provided form (page 10)
- _____ Program Logic Models (one for each year) on provided forms (Attachment 1) *For the City of Ashland logic models are not required.*
- _____ List of officers and board members with their affiliations and phone numbers (Attachment 2)
- _____ 1 Copy of 501(c) (3) tax exemption letter from the Internal Revenue Service. (Attachment 3)
- _____ Financial documentation (Attachment 4)

United Way:

Provide United Way with the Agency's most current year ended annual audit or financial review if the Agency's budget is greater than \$1,000,000 or the Agency receives greater than \$15,000 from United Way, including allocations, WiLL grants, Day of Caring or any other special funding. Compiled financial statements are not acceptable in place of an audit or financial review.

If the Agency's budget is less than \$1,000,000 or the Agency receives less than \$15,000 from United Way, a copy of the 990 must be filed with United Way on the most current year ended. If an Agency received funding from another source with a higher level reporting requirement, the highest level of financial reporting (i.e. if the Agency has a required audit) is then required by United Way

City of Medford: TBD

City of Ashland:

For the City of Ashland please provide only year-end financial statement and an external management letter if available. No audit is required with submission; it may be requested at a later date if needed.