

# 2026-2027 Cascade County Grant Cycle

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## *United Way of Cascade and Hill County*

### *Guidelines*

Dear Human Service Provider:

United Way of Cascade County (UWCC) is working to build a stronger community, creating opportunities for everyone by focusing on the following community-level outcomes:

- Youth Opportunity - Helping young people realize their full potential.
- Financial Security - Creating a stronger financial future for every generation.
- Healthy Community - Improving health and well-being for all.

For our 2026 Fiscal Year (July 2026 – June 2027) we are asking human service providers that align with our community goals to propose strategies to help us advance in these areas. Alignment with our stated goals and collaborative involvement with community level efforts are critical considerations of funding requests.

**To be considered for funding, the program cannot discriminate based on race, color, religion, gender identity, sexual orientation, age, national origin, ancestry, physical or mental disability, marital status or other legally protected classes. (Those agencies with a religious affiliation wishing to receive funds must not refuse services to an applicant based on religion or require attendance at religious services as a condition of assistance, nor will such groups engage in any religious proselytizing in any program receiving United Way funds.)**

### **One Pager**

Included in the application, is a 5 question “one pager”. These questions are self-explanatory and are intended to give a simple narrative of the program for which you are applying for funding so that our Grant Review volunteers can easily understand and follow. This is really setting the stage for the entire application. Most applicants may find it easier to write this after they complete the application.

**Organization’s purpose and mission:** your mission statement will suffice.

**Brief program description:** Provide a concise explanation of the program you are proposing for funding. This should be a very general overview, do not go into detail on any aspect.

**I.) Values:** explain your organization’s position on the following:

Collaboration – to ensure that scarce financial and human resources are used effectively, UWCC encourages collaboration among public and private human service providers. At a minimum, the program should be involved or working toward involvement in United Way's corresponding community-level initiative: "Graduate to Elevate" (previously Graduation Matters), "Prosperity Matters" and the local Continuum of Care, or "Healthy Lives, Vibrant Futures".

Reducing duplication - while the demand for human services in Cascade County is greater than the current system can meet, UWCC shares a community concern about the duplication of effort among service providers. UWCC volunteers will be proactive in their efforts to monitor duplication of effort and encourage providers to find ways to prevent unnecessary duplication.

Preventing root causes of issues - Programs that are preventive in nature will receive priority consideration, but we will continue to ensure that demands for basic needs in our community are met.

**II.) Outcomes:** (This is probably the most critical section of your application). From the dropdown menu, choose the primary community goal your program will advance. Your program outcomes are the specific outcomes or goals you have for your clients/target population. The program outcomes must directly correlate to the primary community goal. Do not go into detail on how or why you set these outcomes, how you will achieve them, or even how you evaluate if you are reaching them – simply state your program outcomes or goals and clarify how it advances the identified primary community goal.

**III.) Target Population:** Describe how your program targets populations experiencing disparities (e.g., people of color, low-income people). Explain how community-level data informs your target population. Please indicate how you determine eligibility. United Way of Cascade County's goal is to close disparities in education, employment, healthcare, and all other areas. Organizations that help achieve that goal will be weighed positively.

**IV.) Activities:** Explain the activities the program will conduct to achieve the program outcomes referenced earlier in the application. This section may further explain or define what was generically referenced..

**V.) Resources Needed:** Provide information on the resources dedicated to or used by the program, including staff, volunteers, facilities, equipment and supplies.

**VI.) Outputs:** Provide the actual numbers or goals for clients and numbers or goals for activity levels. So tell us how many people you expect to serve, how many "things" you will produce or provide and how many of the activities will be conducted. **If this is an existing program, give historical data.** For example: We plan on providing 6 classes this coming year and reaching 32 people; over the past three years we have averaged conducting 4 classes each year and averaged 30 individuals in each class. Be sure to give an unduplicated estimate or goal for individuals served.

**VI.) Measures/Indicators:** Describe how you determine if the program is achieving (or will achieve) the outcomes you listed earlier in the application. List each program outcome with a specific measure that makes sense in determining if the outcome is being achieved. If you use the same measure for different outcomes, still list each outcome separately with a corresponding measure. The measure should make sense in that it demonstrates improvement in the stated outcome. **If this is an existing program, give historical data.**

### **Financial Statement Policy for Funded Services**

All service providers that request a grant from United Way of Cascade County must comply with the Financial Statement Policy as follows.

**Total revenues of less than \$200,000** – a form 990 or 990-EZ must be submitted.

**Total revenues of \$200,000 and above** – a form 990 must be submitted.

In addition, if you have:

**Total revenues of \$500,000** – less than \$1million – Compiled financial statements by an independent certified or licensed accountant must be submitted.

**Total revenues of \$1million** – less than \$2million – a review or audit performed by a certified public accountant must be submitted.

**Total revenues of \$2million or more** – an audit performed by a certified public accountant must be submitted.

*Exemptions from this policy will be given only to funded services under the direct sponsorship of a governmental unit and which are included in the audit of that governmental unit.*

*If a funded service changes its fiscal year in order to coincide with United Way's fiscal year or that of a major funding source, a compilation as specified above for the short year plus the 12 months prior to the start of the short year will be accepted.*

### **Process**

**A mandatory training workshop on the application process will be held on Monday, February 23, 2026 from 10:00am – 12:00 pm at Montana Credit Union, 15 14th St S. Your organization must have a representative present to be eligible to apply for funding. Please bring a laptop computer as we will be using an online grant software for applications and evaluations for the first time this year. If a representative is not present for the training, the organization will not be considered for funding.**

All applications for UWCC funding for Fiscal Year 2026 must be submitted in our grants portal no later than 5:00 p.m. on **April 2, 2026**. There will be a virtual drop-in help session for applicants on March 19 from 11:00-1:00.

Applicants will receive preliminary scores, feedback and questions by April 22 and will have until April 29 to provide written responses.

Grant Review Committee volunteers will be assigned to subcommittees and will hear presentations from agency representatives on **May 5-7**. The full Grant Review Committee will meet the following week to determine funding recommendations.

The recommendations will be heard and considered by the UWCC Board of Directors at its May 21, 2026, meeting. Funding decisions will be communicated to applying agencies by 5:00 PM on **May 29, 2026**. Disbursement of funds for Fiscal Year 2026 will be made monthly beginning July 1, 2026.

Applicants should note that UWCC has not historically supported 100% of program or agency budgets. UWCC funding often leverages other agency resources. All funding decisions will be based, in part, on several criteria:

- Validity and value of program outcomes and measures.
- Alignment with desired community goals.
- Resources required to achieve the desired outcomes.
- Capacity of the applicant to implement service strategies.
- Availability of funds.

UWCC generally supports the costs of service delivery to achieve the stated outcomes including personnel, supplies, and necessary overhead/administrative expenses. Because funds are limited, requests for capital expenditures such as equipment, vehicles, and facility purchase, or renovation are discouraged. UWCC will not make direct contributions to endowments or reserve funds.

**All organizations receiving funding from UWCC are required to report progress.** The schedule for these reports and a standard form with instructions will be provided with the notice of funding approval. **In addition to the written reports, each funded service may be asked to meet with a panel of grant volunteers to review progress.** These meetings are intended to provide assistance in meeting United Way requirements and to help fully utilize outcomes.

**NOTE: each funded service is a critical partner in helping United Way strengthen our community. Community-level initiatives have been formed around each community goal. Funded services will be expected to participate and help advance the work of the appropriate initiative. We also ask that funded services provide the opportunity for their staff, board of directors, and volunteers to participate in the United Way Annual Campaign. United Way's**

**Development Director or Campaign Cabinet Member will reach out to you in the early fall for this opportunity.**

**CHECKLIST** - the following must be included in your proposal by submitting or uploading on the Foundant Portal:

1. Completed FY 2026 RFP Application
2. Completed “one pager”
3. IRS letter of determination
4. List of Board of Directors with contact information
5. Most recent financial statements (monthly/quarterly balance sheet and income/expense statement)
6. Most recent audit (or document complying with policy on page 5 of these guidelines)

**Please note the following dates (all 2026):**

- February 23– mandatory training workshop (10:00am-12:00pm, MT Credit Union, 15 14th St S)
- March 19 - (11:00-1:00) Optional Virtual Drop-In Technology Coaching
- April 2 – proposals due to United Way through grants portal, no later than 5:00pm.
- April 14 - (12-1:00) Optional Virtual Coaching Session-Preparing for Presentations
- April 22 – preliminary scoring, comments and questions from volunteers forwarded.
- April 29 – written responses to feedback/questions due no later than 5:00pm.
- May 5 & 6 – Presentations to volunteers (30 min slots, MT Credit Union, 15 14th St S).
- May 29 – funding decision communicated to applicants via email.
- July 1 – monthly disbursement of funds begins.

**Reporting Requirements/Due Dates**

January 29, 2027-6 Month Report

July 30, 2027-Year End Report

**Questions?** If you have any questions, please call Lacey Hallett at (406)727-3400 x8 or email [lacey.hallett@uwccmt.org](mailto:lacey.hallett@uwccmt.org).

**Program Name**

**Program Name\***

*Character Limit: 100*

## *Community Goals*

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### **Community Goal\***

Identify the primary community goal this program will advance.

### **Choices**

- IA. YOUTH OPPORTUNITY-Children entering Kindergarten are prepared to succeed.
- IB. YOUTH OPPORTUNITY-Improving 3rd Grade Reading Proficiency
- IC. YOUTH OPPORTUNITY-Reducing Chronic Absenteeism
- ID. YOUTH OPPORTUNITY-Increasing Graduation Rates
- IIA. FINANCIAL SECURITY-Reducing the Number of People in Poverty
- IIB. FINANCIAL SECURITY-Increasing the Number of Higher Wage Jobs
- IIC. FINANCIAL SECURITY-Increasing Home Ownership
- IID. FINANCIAL SECURITY-Meeting Basic Needs
- IIIA. HEALTHY COMMUNITY-Achieving & Maintaining Healthy Weight
- IIIB. HEALTHY COMMUNITY-Reducing Binge Drinking and Drug Use
- IIIC. HEALTHY COMMUNITY-Improving Access to Healthcare
- IID. HEALTHY COMMUNITY-Preventing Child Abuse & Neglect

## *One Pager*

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### **What are you aiming to accomplish?\***

*Character Limit: 200*

### **What is your strategy for making this happen?\***

*Character Limit: 500*

### **What are your organization's capabilities for doing this?\***

*Character Limit: 400*

### **How will you know if you are making progress?\***

*Character Limit: 400*

### **What have and haven't you accomplished so far?\***

*Character Limit: 500*

## *Application*

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### **Amount Requested\***

**Maximum grant allowed is \$50,000**

*Character Limit: 20*

**Organization's Purpose and Mission\***

Share your Organization's purpose and mission.

*Character Limit: 1000*

**Proposed Program\***

Please describe the proposed program.

*Character Limit: 750*

**I.) Organizational Values/Activities\***

How do your organization's values and activities align with the priorities of collaboration, reducing duplication and preventing root problems?

*Character Limit: 1875*

**II.) Program Outcomes/Goals\***

List program outcomes or goals.

*Character Limit: 2500*

**III.) Target Population\***

Describe the program target population.

*Character Limit: 750*

**Number of People Impacted\***

Please estimate how many unduplicated individuals who will be impacted by the program in the application.

*Character Limit: 6*

**IV.) Activities\***

Describe the program activities and how they are designed to meet the desired program outcomes you described above.

*Character Limit: 1250*

**V.) Resources Needed\***

Provide information on the resources dedicated to or used by the program, including staff, volunteers, facilities, equipment and supplies.

*Character Limit: 1250*

**VI.) Outputs\***

Provide information on the number of classes, participants, quantity of materials distributed, or hours of service delivered.

*Character Limit: 1250*

## VII.) Measures/Indicators\*

Describe how you will measure or evaluate the program to determine whether it achieves its intended objectives. Include goals or expectations of success. This section should provide specific data that will be tracked to measure changes from before participation in the program to after participation (e.g., percentage of participants who demonstrate increased skills learned or behavior improved). If your program does not use the same measure as the primary community goal listed on the last page of this application, please explain how your measure relates to UW's. If this is an existing program, provide past performance.

*Character Limit: 3125*

## *Financial Overview*

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### **Total organizational budget\***

*Character Limit: 20*

### **Total Proposed Program Budget\***

*Character Limit: 20*

### **Amount Requested from United Way of Cascade County\***

Make sure this amount matches the amount listed at the top of the application.

*Character Limit: 20*

### **Do you have a minimum funding requirement?\***

#### **Choices**

Yes

No

#### **If YES,**

We need a minimum of \$\_\_\_\_\_ (enter amount below) to execute our proposal and/or follow the reporting requirements outlined in this RFP. If United Way cannot fund this minimum amount, we will not accept any funding.

*Character Limit: 20*

#### **If NO,**

No, we will accept any amount the committee deems appropriate. (Please describe the impact reduced funding will have on your program and the outcomes you'll be able to accomplish.)

*Character Limit: 500*

## **Financial Overview\***

Please provide a detailed, line-item budget for the proposed program. The budget should include, but not be limited to, the following categories:

Baseline costs  
Per unit costs  
Personnel costs  
Cost of materials and supplies  
Overhead costs  
Other costs

Note: All costs should be directly related to the proposed program and should not reflect your organization's overall operating budget.

*Character Limit: 1250*

## *Documents*

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### **IRS Letter of Determination\***

*File Size Limit: 1 MB*

### **Board of Directors\***

Include a list of Board of Directors with their contact information (e-mail and/or phone number)

*File Size Limit: 1 MB*

### **Financial Statement\***

Refer to the Financial Statement Policy listed in the Guidelines to determine what type of statement you need to upload.

*File Size Limit: 1 MB*