



Synergy Fund Implementation Grant Application

Overview: United Way of Ontario County encourages and supports affiliations (mergers, consolidations, acquisitions, joint-ventures) among Ontario County not-for-profit organizations. Implementation grants of up to \$10,000 are available to organizations that are affiliating with board approval and in need of assistance with the one-time costs of effecting the affiliation.

Eligibility: Not-for-profit 501Cs organizations, at least one of which must be from Ontario County, that have affiliated and are in financial need for assistance to implement their affiliation are eligible to apply.

Process: The application process involves submitting a written request for funding and participating in a grants interview. The information gathered from both the written request and the interview will be used by the grants committee in its decision making. Submit a Synergy Fund Implementation Grant request by emailing a narrative of no more than two pages, which addresses the information below, and attachments to kari.buch@uwrochester.org.

Grant Request Elements:

- **Letter of interest:** From all interested parties, which should contain the following:
 - Signatures from the Board President and the Executive Director of each organization
 - Type of affiliation anticipated
 - Specific reasons for affiliation, such as expected efficiencies, benefits to the community, or improved delivery of services
 - Letter of determination of 501c(3) status from the IRS for each organization
- **Overview:**
 - Briefly describe the current status of the project.
 - Attach a copy of the board resolutions to affiliate and, if available, the affiliation plan (including implementation timeline) along with the IRS determination letters of the affiliating organizations
- **Contact Information:**
 - Provide name, title, organization, mailing address, phone, and email for the contact for this request
- **Financial Documentation:** From all interested parties
 - Recent audited financial statements and 990
- **Risk-Benefit:**
 - List the principal benefit of the affiliation
 - List the potential risks associated with the affiliation



- **Cost:**
 - Provide a budget listing the following:
 - primary costs associated with the complete affiliation
 - estimated total cost of the complete affiliation
 - expected one-time costs of implementing the affiliation
- **Funding:**
 - In addition to a possible grant from our fund, explain how do you expect to cover the affiliation costs
 - List other funders that have been approached for support
 - Indicate and requests made, if the funding has been secured with the source and amount

An application is not a guarantee of funding under this program. United Way expects to respond to complete applications within eight weeks of submission. Final awards will require an in-person meeting with, and approval of, the Synergy Committee.

Questions: Contact Kari Buch, Executive Director, United Way of Ontario County
(585) 394-6550 or kari.buch@uwrochester.org