



## 2018-2019 COLLABORATION GRANTS | GUIDELINES

### OVERVIEW

United Way of Charlotte County's (UWCC) mission is to lead the united effort to eliminate poverty by investing in our community. Our next step in this effort is to change our grant making process by offering United Way funds in support of Collaborative Programs proposed by nonprofit organizations.

### UNITED WAY OF CHARLOTTE COUNTY COMMUNITY GOALS

UWCC seeks grant requests from nonprofit organizations that will work collaboratively to address one of our three Bold Goals for Charlotte County:

**Financial Stability** – We envision a community where financial stability is available for everyone.

**Education** – We envision a community where at least 70% of Charlotte County 3<sup>rd</sup> grade students are reading at grade level or beyond by June 2022.

**Health and Wellness** – We envision a community where ALL children, adults and senior citizens have access to services that improve their well-being, and therefore the overall health of Charlotte County.

### USE OF FUNDS

Funds may be requested to support new or existing collaborative programs, and may only be allocated to nonprofit organizations.

Funds may be used only to provide program services to Charlotte County residents.

Funds may be used to cover direct program expenses incurred during the United Way funding cycle which runs from April 1, 2018 – March 31, 2019.

There is no minimum or maximum limit imposed on grant requests. Lead agencies are encouraged to request an amount of funding that is reasonable and necessary to ensure efficient program operation.

Lead agencies are required to designate a Program Coordinator position to coordinate Collaborative Program activities and provide oversight for all partners. Proposed costs for this position must be noted on the Program Budget and explained in the Budget Narrative section of the spreadsheet.

UWCC expects to distribute approximately \$300,000 in grant funding, and to provide funding for at least one Collaborative Program per Bold Goal impact area.

UWCC intends to be a long-term partner in supporting Collaborative Programs. As such, at the end of this funding cycle, grantees will have the opportunity to apply for renewed funding.

## ELIGIBILITY

Requests for funding through UWCC's Collaboration Grants Cycle must meet the following requirements:

- Proposed Collaborative Programs must impact one of the three Community Goals (Financial Stability, Education, or Health and Wellness), and must serve residents of Charlotte County.
- Proposed Collaborative Programs must provide a health, welfare, or social service.
- Proposed Collaborative Programs must be managed by a designated lead agency (only nonprofit organizations may serve in this capacity).
- Lead agencies must be willing to negotiate revised program outcomes and budget expenditures with UWCC staff as a condition of accepting funding.
- If awarded funding, lead agencies agree to provide a thorough accounting through quarterly reporting, to include details regarding financial expenditures, programmatic oversight, and outcomes evaluation.
- Proposed Collaborative Programs must include a partnership between the nonprofit organization serving as lead agency and at least one other nonprofit organization. Lead agencies are encouraged to include partnerships with multiple nonprofit organizations. Other stakeholder groups (such as schools, hospitals, medical providers, law enforcement agencies, faith-based organizations, businesses, volunteers, or service organizations) are encouraged to participate in the proposed Collaborative Program.
- Collaboration grant funding will not be awarded to primarily religious organizations; educational institutions (schools/universities); or fraternal, governmental, political, cultural, or animal organizations. Collaborations may include these organizations, but must have a lead agency that is a nonprofit organization. Grants will not be awarded for endowment campaigns, land purchase, construction of new facilities or major renovating of existing facilities, or capital campaigns.
- The lead agency and each collaborative nonprofit organization must be incorporated, not-for-profit organizations, possessing tax-exempt status under section 501(c)3 of the Internal Revenue Service code.
- The lead agency and each collaborative nonprofit organization must have an annual audit of their financial affairs, prepared by an independent CPA. Copies of the audit and the IRS Form 990 must be made available to the United Way of Charlotte County's Board of Directors as soon as they become available.
- The lead agency and each collaborative nonprofit organization must have administrative expenses of less than 25%, as determined by their IRS Form 990.
- The lead agency and each collaborative nonprofit organization must be governed by active, volunteer, policy-making Boards that include residents from the Charlotte County community. Governing Boards must meet at least quarterly and members must have rotating terms of service. Minutes of agency Board meetings must be made available to the United Way upon request.
- Neither the lead agency nor any of the collaborative nonprofit organizations may discriminate on the basis of race, ethnicity, religion, sex, sexual orientation, gender identity/expression, age, or national origin in their staffing policies, use of volunteers, or provision of services.
- The lead agency and each collaborative nonprofit organization must demonstrate the clear ability to manage programs and finances in accordance with generally accepted procedures.
- The lead agency and each collaborative nonprofit organization must agree to abide by the terms set forth in the Partner Agreement.

## SUBMITTING THE APPLICATION

Submission of the Collaboration Grant Application and all required attachments is a two-part process. Both parts must be completed by 4:00pm on Monday December 18, 2017. No late submissions will be accepted.

### Part One

Lead agencies must submit paper copies of each of the following documents to the UWCC office:

- 15 paper copies of the Collaboration Grant Application
- 15 paper copies of the Collaboration Grant Program Budget (The Program Budget Template provided by UWCC must be used to complete this requirement.)
- 1 paper copy of the most recent Audited Financial Statements (lead agency and all nonprofit partners)
- 1 paper copy of the most recent IRS Form 990 (lead agency and all nonprofit partners)

### Part Two

Lead agencies must submit an electronic copy of each of the following documents to Dropbox:

- Collaboration Grant Application
- Collaboration Grant Program Budget (The Program Budget Template provided by UWCC must be used to complete this requirement.)
- Most recent Audited Financial Statements (lead agency and all nonprofit partners)
- Most recent IRS Form 990 (lead agency and all nonprofit partners)
- Most recent 501(c) 3 Nonprofit Letter of Determination (lead agency and all nonprofit partners)
- Organization Chart (lead agency and all nonprofit partners)
- Organization Budget (lead agency and all nonprofit partners)
- Board of Directors List (lead agency and all nonprofit partners)
- Memorandums of Understanding with every nonprofit collaborative partner listed in the grant application

## SCORING

All Collaboration Grant applications and required attachments will be evaluated by UWCC's Community Impact Panel. Community Impact Panel members will use a Scoring Worksheet to rate Grant Applications and determine recommendations for funding. The Scoring Worksheet is available on the UWCC website for review.

## CONDITIONS

Lead agencies that are awarded funding must agree to participate in quarterly reporting by providing details regarding financial expenditures, programmatic oversight, and outcomes evaluation. Reporting for the first and third quarter will be structured as meetings between the lead agency and UWCC staff to discuss progress. Written reports will be required for the second (mid-year) and fourth (year-end) quarterly reports.

If funding is awarded and a lead agency or collaborative nonprofit partner is no longer able to participate in the Collaborative Program as stipulated in their Partner Agreement Contract, UWCC Staff and Board of Directors must be notified immediately. Upon notification, UWCC Staff and Board of Directors will work with remaining partners to determine a corrective course of action.

## NEXT STEPS

To apply for a Collaboration Grant, lead agencies must complete the Intent to Participate Form. UWCC staff will provide each applicant with access to a Dropbox account where all grant application materials may be submitted.

Nonprofit organizations interested in serving as a Lead Agency for a Collaboration Grant are required to schedule at least one technical assistance session with Aimee Coley, UWCC's Director of Collective Impact. Lead agencies may request more than one session if they would like continued assistance with planning a Collaborative Program, completing the Collaboration Grant Application, or to discuss other needs and concerns as they arise. Sessions may be scheduled between November 1 – December 15, 2017. You may contact Aimee to schedule sessions via telephone at 941-627-3539 or via email at [aimee.coley@unitedwayccfl.org](mailto:aimee.coley@unitedwayccfl.org).

## TIMELINE

October 10, 2017	2018-2019 Grant Guidelines and Grant Applications released
October 24, 2017	<b><u>Mandatory All Agency Grant Workshop</u></b> 1:00pm at CDBIA conference room 17984 Toledo Blade Blvd., Port Charlotte, FL 33948 (Applicants are required to attend this mandatory training and information session to be eligible to apply for United Way, Board of County Commissioners, or City of Punta Gorda funding. <b><u>No exceptions will be made to this requirement.</u></b> )
Nov. 1 – Dec. 15, 2017	Required Technical Assistance Sessions for Collaboration Grants
November 7, 2017	Collaboration Grant Intent to Participate Forms Due by 5:00pm
December 18, 2017	All grant applications (including electronic and hard copy documents) for United Way, Board of County Commissioners, or City of Punta Gorda funding due by 4:00pm.
February 2018	Community Impact Panel review; nonprofit organization tours and presentations to Community Impact Panel volunteers
April 2018	Collaboration Grant Awards Announced