

2019-2020 Board of County Commissioners and City of Punta Gorda 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. Grant funds from the Board of County Commissioners and City of Punta Gorda are available to support nonprofit organizations providing program services that help to alleviate poverty among Charlotte County residents. For more information about how poverty affects our community, learn about ALICE at <https://www.unitedwayccfl.org/alice>.

UNITED WAY OF CHARLOTTE COUNTY COMMUNITY GOALS

UWCC seeks Program Grant requests from nonprofit organizations that will work 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 3rd 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 must be used for providing services to Charlotte County residents.
- Funds may be used to cover direct program expenses incurred during the Board of County Commissioners / City of Punta Gorda funding cycle which runs from **October 1, 2019 – September 30, 2020**.
- Funds can be requested to support new or existing Program Grants and will only be allocated to 501c3 designated nonprofit organizations.
- This funding request should not constitute the total program budget.
- Applicants requesting funds for the first time or who are requesting funds for a new program are encouraged to request an amount of funding that is reasonable and necessary to ensure efficient program grant operation but will need to fully justify their alignment with mission to eliminate poverty.
- Agencies requesting increases in funding will need to clearly justify the increase in funding.

ELIGIBILITY

Requests for Program Grant funding must meet the following requirements:

- **Program must:**
 - help to alleviate poverty and serve residents of Charlotte County.
 - provide a human, health, welfare, or social service.
 - impact one of the three Community Goals (**Financial Stability, Education, or Health and Wellness listed on page one**).
- **Program Grant funding will not be awarded:**
 - to organizations that are primarily religious; educational institutions such as schools/universities); fraternal, governmental, political, cultural, or animal organizations.
 - for endowment campaigns, land purchase, construction of new facilities or major renovating of existing facilities, or capital campaigns.
- **Partner agency must:**
 - be incorporated, not-for-profit organizations, possessing tax-exempt status under section 501(c)3 of the Internal Revenue Service code.
 - have an annual audit of their financial affairs that is prepared by an independent CPA and must provide copies of the audit and the IRS Form 990 at the time of the application. If the agency's total budget is over \$50,000, an audit is needed; if the agency's total budget is under \$50,000, a review is needed.
 - have administrative expenses of less than 25%, as determined by their IRS Form 990. The percentage is computed from information on IRS Form 990 using this method: from Part IX, add together Line 25(C) and Line 25 (D) (Total Management and General expenses, plus Fundraising expenses). Divide this figure by Part VIII, Line 12 (A) (Total Revenue).
 - be governed by active, volunteer, policy-making boards that include residents from the Charlotte County community. The lead agency and partner agencies Governing Board must meet at least quarterly and must have systematic rotation of terms of board membership service. Minutes of agency board meetings must be made available to the UWCC upon request.
 - demonstrate the clear ability to manage the Program Grant finances in accordance with accepted procedures.
 - not discriminate based on race, ethnicity, religion, sex, sexual orientation, gender identity/expression, age, or national origin in their staffing policies, use of volunteers, or provision of services.
 - agree to abide by the terms set forth in the **Partner Funding Agreement**.
- As a condition of accepting Program Grant funding, the agency must be willing to negotiate revised program outcomes and budget expenditures with UWCC staff.
- If awarded funding, the agency must agree to provide a quarterly thorough accounting report; to include details on financial expenditures, programmatic oversight, and outcomes.

SUBMITTING THE APPLICATION

Submission of the Grant Application and all required attachments is a two-part process. Both parts must be completed by 4:00pm on Monday November 28, 2018. **Late submissions will NOT be accepted.**

Part One

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

- 15 paper copies of the Grant Application
- 15 paper copies of the Program Budget (The Program Budget Template provided by UWCC must be used to complete this requirement.)
- 15 paper copies of the FINAL PROGRAM REPORT for the 2017-2018 grant cycle.
- 1 paper copy of the most recent Audited Financial Statements
- 1 paper copy verifying **CURRENT** 501(c)(3) tax-exempt status and public charities status
 - IRS determination letter indicating 501(c)(3) tax-exempt status and public charities status
 - Most recent 990 showing public charities status and public support
- 1 paper copy of Organization Chart
- 1 paper copy of Organization Budget
- 1 paper copy of Board of Directors List

Part Two

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

- Grant Application
- Grant Program Budget (The Program Budget Template provided by UWCC must be used to complete this requirement.)
- FINAL PROGRAM REPORT for the 2017-2018 grant cycle.
- Most recent Audited Financial Statements
- **CURRENT** 501(c)(3) tax-exempt status and public charities status
 - IRS determination letters indicating 501(c)(3) tax-exempt status and public charities status
 - Most recent 990 showing public charities status and public support
- Organization Chart
- Organization Budget
- Board of Directors List

Provide the following supporting documents with the application:

- Strategic Plan for new program requests
- Letters of support from non-funded partners or stakeholders (if available)

SCORING

All Program 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 Program Grant Application and to determine recommendations for funding. The Scoring Worksheet is available on the UWCC website for review.

CONDITIONS

If Grant funding is awarded and the agency is no longer able to participate in the Program Grant as stipulated in their Partner Funding Agreement Contract, UWCC Staff and Board of Directors must be notified immediately. Upon notification, UWCC Staff and Board of Directors will work to determine a corrective course of action.

NEXT STEPS

To apply for a Program Grant, 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.

Technical support sessions may be scheduled between Oct 24 – Nov 28, 2018 by contacting **CarolAnn Popovich** via telephone (Office: 941-627-3539 | Cell: 941-585-1447; Email: cid@unitedwayccfl.org).

TIMELINE

October 16, 2018	2019 – 2020 Grant Guidelines and Grant Applications released
Oct 23, 2018	<u>Mandatory All Agency Grant Workshop</u> 1:00 -3:00pm 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. <u>No exceptions will be made to this requirement.</u>
Oct 24 – Dec 23, 2018	Technical support sessions for Collaboration Program Grant applications are available. Call or email CarolAnn Popovich, UWCC Director of Collective Impact , to request assistance or schedule an appointment. <ul style="list-style-type: none">○ 941-627-3539 (office) 941-585-1447 (cell)○ cid@unitedwayccfl.org
November 5, 2018	Intent to Participate Forms due by 4:00pm, Monday, November 5.
November 28th, 2018	All grant applications (including electronic and hard copy documents) for UWCC, Board of County Commissioners, or City of Punta Gorda funding due by 4:00pm, Wednesday, November 28.
February 2019	Community Impact Panel review; tours and presentations to Community Impact Panel volunteers
April 2019	Collaboration Grant Awards Announced