

## 2019-2020 COLLABORATION PROGRAM 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. Collaboration Program Grant funds are available to support nonprofit agency's programs that provide 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 Collaboration Program 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 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 can be requested to support new or existing Collaboration Program Grants and will only be allocated to 501c3 designated nonprofit organizations.
- Funds must be used for providing services to Charlotte County residents.
- Funds must be used to cover direct Collaboration Program Grant expenses incurred during the **UWCC funding cycle** which runs from **April 1, 2019– March 31, 2020**.
- There is no minimum or maximum limit imposed on Collaboration Program Grant requests. Agencies are encouraged to request an amount of funding that is reasonable and necessary to ensure efficient Collaboration Program Grant operation.
- Lead agencies are required to designate a **Program Coordinator/Manager** position to coordinate Collaborative Program Grant activities and provide oversight for all partners. Proposed costs for this position must be noted on the **Collaboration Program Grant Budget** and explained in the **Collaboration Program Grant Budget Narrative** section of the spreadsheet.
- UWCC intends to be a long-term partner in supporting Collaboration Program Grants. As such, at the end of this funding cycle, grantees will have the opportunity to apply for renewed funding.

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

- **Proposed Collaboration Program Grant 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**).
  - be managed by a designated lead agency (*only nonprofit organizations may serve in this capacity*).
  - include a partnership between a nonprofit organization serving as **lead agency** and at least one other nonprofit organization serving as **partner agency**. 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 Collaboration Program Grant.
- **Collaboration 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.
- **The lead agency and each 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 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.
  - 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 Collaboration Program Grant and Collaboration 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 Collaboration Program Grant funding, the lead agency must be willing to negotiate revised program outcomes and budget expenditures with UWCC staff.
- If awarded funding, the lead 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 **Collaboration Program Grant Application** and all required attachments is a two-part process. Both parts must be completed by 4:00pm, Wednesday, November 28, 2018. **No late submissions will be accepted.**

### Part One

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

- 15 paper copies of the Collaboration Program Grant Application
- 15 paper copies of the Collaboration Program Grant Budget (*The Program Budget Template provided by UWCC must be used to complete this requirement.*)
- 15 paper copies of the most recent Interim Report for Collaboration Program Grants requesting renewed funding
- 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 Program Grant Application
- Collaboration Program Grant Budget (*The Collaboration Program Grant Budget Template provided by UWCC must be used to complete this requirement.*)
- Most recent Interim Report for Collaboration Program Grants requesting renewed funding
- 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 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 Collaboration Program Grant Application and to determine recommendations for Collaboration Program Grant funding. The Scoring Worksheet is available on the UWCC website for review.

## CONDITIONS

If Collaboration Program Grant funding is awarded and a lead agency or collaborative nonprofit partner is no longer able to participate in the Collaboration Program Grant as stipulated in their Collaboration Program Grant 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 Program 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 Program Grant are required to schedule at least one technical assistance session with **CarolAnn Popovich, UWCC's Director of Collective Impact**. Lead agencies may request more than one support 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.

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](mailto:cid@unitedwayccfl.org)).

## TIMELINE

October 16, 2018	2019 – 2020 Grant Guidelines and Grant Applications released
Oct 23, 2018	<b><u>Mandatory All Agency Grant Workshop</u></b> 1:00 -3:00pm at Charlotte Desoto Building Industry Association (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>

Oct 24 – Dec 23, 2018	<p>Technical support sessions for Collaboration Program Grant applications are available. Call or email <b>CarolAnn Popovich, UWCC Director of Collective Impact</b>, to request assistance or schedule an appointment.</p> <ul style="list-style-type: none"> <li>○ 941-627-3539 (office)   941-585-1447 (cell)</li> <li>○ <a href="mailto:cid@unitedwayccfl.org">cid@unitedwayccfl.org</a></li> </ul>
November 5, 2018	<b>Intent to Participate Forms</b> due by 4:00pm, Monday, November 5.
<i>November 28<sup>th</sup>, 2018</i>	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