



2022-2024 GRANT GUIDELINES

UWCC Collaborations, Board of County Commissioners, and City of Punta Gorda

OVERVIEW

United Way of Charlotte County's (UWCC) mission is to mobilize the power of our community to break the cycle of poverty. In addition to direct services provided by our staff and volunteer team, UWCC administers grant funding to organizations serving Charlotte County, Florida in order to harness all our resources to build strong households and strong neighborhoods.

Grant funds are available to support 501(c)(3) nonprofit organizations providing program services that help to alleviate poverty among Charlotte County residents in the three community priority areas: **Educational Success**, **Financial Stability**, and **Health and Wellbeing**.

Limited funding is available from these sources:

- Charlotte County Board of County Commissioners
- City of Punta Gorda
- United Way of Charlotte County

Prior to the pandemic, 10% of Charlotte County's population was living in poverty and another 30% fell just above the Federal Poverty Line, living paycheck to paycheck. UWCC's long-term focus is on empowering individuals and families to break generational cycles of poverty, but we know that the economic and health impacts of COVID-19 have left many more families struggling to meet their basic needs, with food and housing insecurity skyrocketing.

With this in mind, funding requests for programs that support **Basic Needs** will also be accepted. This dual approach will move Charlotte County forward again, by emphasizing immediate support for those in crisis and building a long-term vision for impact.

For more information about how poverty affects our community, learn about ALICE at www.unitedwayccfl.org/alice.

IMPORTANT NOTES ABOUT 2022-2024 GRANT CYCLE

- Funds can be requested to support **new or existing programs**.
- Agencies are limited to applying for no more than two programs through BOCC/COPG funding. Community Collaboration requests are limited to one program serving one client population.
- Funding will run from **October 1, 2022 – September 30, 2024**. Continuity of funding for the second year is contingent upon availability of funds and a satisfactory mid-cycle Community Impact Panel review of approved programs.
- Funding is **unrestricted*** and can be used to support programmatic, administrative, and/or organizational overhead costs. The organization may use grant dollars however it deems fit, in compliance with all non-profit state and federal regulations.
 - *Funds must be used for services to Charlotte County residents with the exception of City of Punta Gorda (COPG) funds which are to be used specifically for Punta Gorda residents.
- Attendance at the Grant Workshop and submission of an Intent to Apply are mandatory prior to submitting a full application.
- Grantees (partner agencies) are responsible for **reporting on the outcomes of the entire program funded** and not a portion of the clients served. Reporting includes grant cycle performance (i.e., outcomes and outputs), participant demographics, narrative descriptions of program progress and challenges, and success stories.
- New applicants or those requesting funding for a new program are encouraged to request an amount of funding that is reasonable and necessary. Agency will need to fully justify their alignment with the UWCC mission.

Requests for Program Grant funding must meet the following requirements:

- **Program must:**
 - help to alleviate poverty.
 - use funds solely to serve residents of Charlotte County (COPG funding must be used to solely serve residents of the City of Punta Gorda).
 - provide a human, health, welfare, or social service.
 - be a clearly delineated program, serving a specific, measurable group of clients. Applications that lump more than one program together will not be reviewed.
 - directly impact one of the three community priority areas or meet a basic need.
- **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, a marketing position or capital campaigns.
 - for requests that constitute more than 25% of the total program budget.
- **Partner agency must:**
 - Attend the mandatory training on March 9, 2022.
 - at all times maintain a tax-exempt status from the Internal Revenue Service pursuant to section 501(c)(3) of the IRS Code and shall remain in compliance with the Florida Not for Profit Corporation Act, Ch. 617, Fla. Stat., and with all other applicable local, state, and federal laws, rules, and regulations.
 - have an annual audit 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 \$500,000, an audit is needed; if the agency's total annual budget is under \$500,000, [a review is required \(a compilation does not qualify\)](#).
 - have administrative expenses of less than 25%, as determined by its 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 Boards 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.

- clearly demonstrate ability to manage the program 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**.
- **Community Collaboration Programs must:**
 - 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(s). 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.
- As a condition of accepting funding, the partner agency/lead agency must be willing to negotiate revised program outcomes with UWCC staff.
- If awarded funding, the agency agrees to provide thorough accounting reports according to funding agreement; to include details on financial expenditures, programmatic oversight, and outcomes.
- Board of County Commissioners / City of Punta Gorda Grants:
 - Funds are to be used from **October 1, 2022 – September 30, 2024**. (Continuity of funding into the second year is contingent upon availability of funds and a satisfactory mid-cycle Community Impact Panel review of approved programs. Timely and complete reporting is required for consideration of continued funding.)
- **Community Collaboration Grants:**
 - UWCC collaboration funds are to be used from **October 1, 2022 – September 30, 2024**. (Continuity of funding into the second year is contingent upon availability of funds and a satisfactory mid-cycle review of approved programs.)
 - Lead agencies are required to designate a **Program Coordinator/Manager** position to coordinate Collaboration 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.

APPLICATION PROCESS

Full timeline for application process is available on the United Way of Charlotte County website.

The application process begins with the mandatory training to be held on March 9, 2022. Intent to Apply forms must be submitted no later than 4:00 p.m. on Friday, March 18.

Submission of the Grant Application and all required attachments via the UWCC online portal must be completed by 4:00pm on Thursday, April 14, 2022. **Late submissions will NOT be accepted.**

Required items:

- Grant Application
- Agency Organizational Chart
- Agency Board of Directors List
- Agency Budget
- Demographic Data (template to be provided)
- Program Budget (template to be provided)
- 2021 Final Program Report (for all currently funded agencies)
- Letters of support from non-funded partners or stakeholders (encouraged)
- Most recent Audited Financial Statements
- Most recent 990
- Most recent Strategic Plan
- **CURRENT** IRS determination letter indicating 501(c)(3) tax-exempt status and public charities status
- Collaboration Programs will additionally provide:
 - Memorandums of Understanding with every nonprofit collaboration partner listed in the grant application

Technical support will be available from UWCC staff throughout this process. Once submitted, each application will go through a third-party review to pre-screen with potential exclusion from the panel process. Applications may be screened out entirely or referred for mentoring with a deadline for submission of revised materials.

Community Impact Panels will be conducted in May 2022. Applicants will be offered the option of an in-person site visit or a virtual site visit. Applicants are encouraged to consider how best their program can be represented on-site versus virtually. (Current COVID-19 protocols will be the default option if cases are high.)

Award announcements will be made in September 2022.

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 will be reviewed at the mandatory training and be available on the website thereafter.

The areas of focus included in the overall application score include:

- Agency – Agency has a good standing in the Charlotte County community; has overall agency fiscal strength and accountability.
- Program – Program addresses poverty, ALICE families, and at least one of UWCC's community priority areas.
- Program Financials – Cost per client is reasonable; agency describes how funds are leveraged or used for a match.
- Program Outcomes – Outcomes are specific, measurable, and tied to at least one of UWCC's community priority areas. Outputs are welcome, but outcomes that demonstrate how a program is moving the needle will be given higher priority for funding. Qualitative examples of impact through success stories will influence scoring as well.
- Program Demographics – Agency demonstrates ability to report on demographic details of clients served.
- Community Outreach / Collaboration / UWCC Partnership – Agency demonstrates its ability to engage the community, minimize duplication, and provide evidence of being a strong and supportive partner of UWCC.

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.