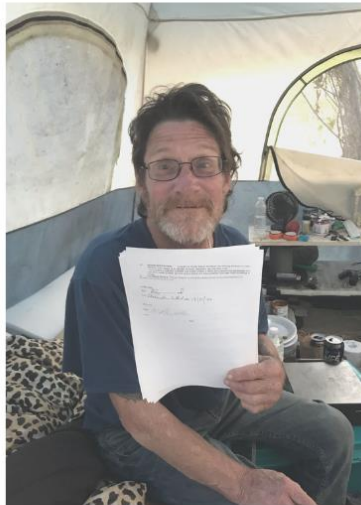
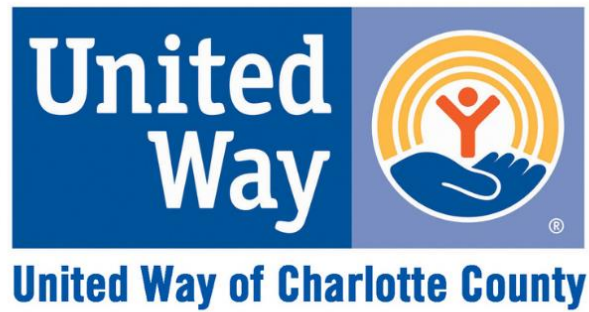


2023-2025

Community Investment Guidelines



***Funding cycle beginning June 1, 2023
and ending September 30, 2024***



2023-2025 COMMUNITY INVESTMENT GUIDELINES

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.

At UWCC, we prioritize our role as a collaborator and convener. We firmly believe that a community investment goes beyond dollars granted; we invest in a partnership of shared successes as well as shared learning. Partners who receive funding through the 2023-2025 Community Investment Grants can expect an active partner in UWCC. We truly believe that we are better together.

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 following priority areas:

United Way of Charlotte County Priorities	
FOUNDATION	
BASIC NEEDS	food, childcare, housing, financial assistance
STEPS TO SELF-SUFFICIENCY	
EDUCATIONAL SUCCESS	parent engagement across all ages, trauma-informed programs, school-readiness, successful transitions
FINANCIAL EMPOWERMENT	increased employability, asset accumulation and sustainment
ADDITIONAL SUPPORT	
SENIORS	reduce barriers that isolate seniors from their peers and community
COMMUNICATION & NAVIGATION	prioritize time, talent, and treasure for communication, navigation, and volunteer efforts

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, the ALICE population (Asset Limited, Income Constrained, Employed). 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 be accepted in addition to programs that provide an aligned contribution to the categories of **Educational Success, Financial Empowerment, Seniors, and Communication & Navigation**. This dual approach will move Charlotte County forward, by emphasizing immediate support for those in crisis and building a long-term vision for impact.

Please note that grant applications must demonstrate an aligned contribution to a specific aspect of the identified strategic priority area, of those listed in the right column of the table on Page 2.

ALICE FOCUS

At United Way of Charlotte County, we focus our work on ALICE, members of our community who might not fit the traditional definition of poverty yet are still struggling. It allows us to account for high costs of housing, childcare, etc., even for individuals who earn above minimum wage.

We encourage all applicants to take the time to understand ALICE and determine whether their program is a fit for this population. All of the following resources are recommended:

- [Florida ALICE Interactive Dashboards](#)
- [The 2020 Florida ALICE Report](#)
- [Florida ALICE County Profiles](#)

United Way Suncoast recorded [this five-minute video](#) giving an overview of ALICE in 2021.

To be eligible for funding, your program must focus on serving those within the ALICE threshold, as well as those living in poverty. As part of your application, you will be asked to provide an estimate of the percentage of clients in the following categories:

- Above the top ALICE household income
- Within the ALICE threshold
- At or below the Federal Poverty Line

Because the ALICE category is based on a multitude of factors, and because each household is unique in its composition, we have provided an average ALICE threshold for single adults, single seniors, two seniors, and families factoring those variables together. When you are asked to make the estimates mentioned above, please use the data from the following table.

Upper and Lower Limits of ALICE in Charlotte County, Florida

Family		Single Adult		Single Senior		Two Seniors	
<i>Bottom of Threshold</i>	<i>Top of Threshold</i>	<i>Bottom of Threshold</i>	<i>Top of Threshold</i>	<i>Bottom of Threshold</i>	<i>Top of Threshold</i>	<i>Bottom of Threshold</i>	<i>Top of Threshold</i>
\$30,000	\$71,580	\$14,580	\$23,904	\$14,580	\$26,400	\$19,720	\$40,248

IMPORTANT NOTES ABOUT 2023-2035 GRANT CYCLE

Our investment streams are open to eligible human services agency and are competitive. Please thoroughly read these guidelines before applying. By investing in community partners with their own individual and innovative approaches to supporting ALICE households, our goal is to create a collective impact on the success of children, youth, adults and families.

- Funds can be requested to support **new or existing programs**.
- Applying agencies are encouraged to submit a request for a minimum of \$5,000 with no maximum. However, please note that up to 18 agencies are eligible to apply. Your request should be mindful of the potential distribution amongst multiple agencies.
- Agencies are limited to applying for no more than one program serving one client population.
- Funding cycle for approved programs will run from **June 1, 2023 – September 30, 2024**. The amount of monthly installments will begin June 1, 2023. Funding from April 1, 2024 through September 30, 2024 will be contingent on program performance and continued availability of funds. UWCC will do all it can to ensure continuity of funding and will notify funded agencies of continued commitment not later than April 1, 2024.
- Attendance at the Grant Workshop March 31, 2023 is mandatory prior to submitting an application.

- Applicants will be required to submit **projected numbers** of clients to be served during the funding cycle. While these are educated guesses, UWCC requests that projections be as realistic as possible based on the information agencies have available, as both under- and over-projecting services may raise concerns.

Our investment process principles are:

- **Accountability:** The shared responsibility of UWCC and grantees to follow guidelines, meet deadlines, and report data in an accurate and timely way.
- **Collaboration:** Communicating and sharing a clear and measurable vision around specific issues or topics and working together to solve these issues.
- **Commitment to results:** Organizational commitment to using data for continuous improvement in partnerships with programs and initiatives supported through investments.
- **Diversity, Equity and Inclusion:** Using equity data as a lens to influence our work and discussing the need and benefits of diversity and inclusion in our supported programs and within our communities.
- **Shared learning and training:** Working alongside agencies through learning communities. Providing learning and training opportunities for grantees.
- **Transparency:** Open and honest communication with grantees and setting clear expectations for performance.

Partners who receive funding through the 2023 Community Investment Grants can expect an active collaborator in UWCC. Any expertise or knowledge that we can share, we will. Any opportunity we have to listen and learn, we will do that as well. We aim to build a diverse cohort of on-the-ground programs that connect and build upon each other's impact to the betterment of the families in Charlotte County.

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.
 - provide a human, health, welfare, or social service.
 - be a clearly delineated program, serving a specific, measurable group of clients.
Applications that attempt to lump more than one program together will not be reviewed.
 - directly impact one of the listed 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.
- **Partner agency must:**
 - be an already vetted organization (i.e., currently receiving funding through BOCC and/or COPG grant funding for 2022-2024).
 - Attend the mandatory training on March 31, 2023.
 - 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.
 - 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 partner agency must be willing to negotiate revised program outcomes and budget expenditures with UWCC staff.
- If awarded funding, the agency agrees to provide reporting on agreed-upon outcomes and outputs of the funded program.
- Funds are to be used from **June 1, 2023 – September 30, 2024**. (Continuity of funding into the second year is contingent upon availability of funds.)

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 31, 2023.

Submission of the Grant Application and all required attachments via the UWCC online portal must be completed by 4:00pm on Friday, April 28, 2023. **Late submissions will NOT be accepted.**

Required items:

- Grant Application
- Program Budget (template provided on website)
- 2021 Final Program Report

Technical support will be available from UWCC staff throughout this process.

Community Impact Panels will be conducted in May 2023. Funding decisions will be made no later than May 31, 2023.

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 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.