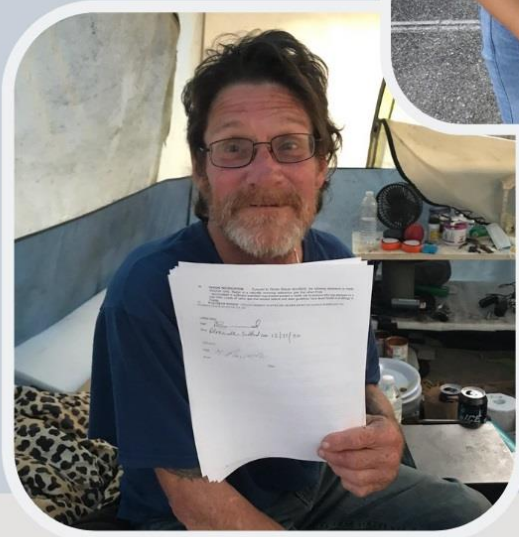
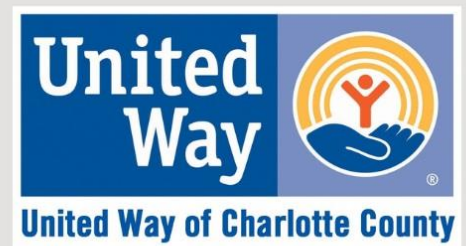


2024-2026

COMMUNITY INVESTMENT GUIDELINES



Funding cycle begins October 1, 2024
and ends September 30, 2026





2024-2026 COMMUNITY INVESTMENT GUIDELINES 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 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 2024-2026 Community Investment Grants can expect an active partner in UWCC. We truly believe that we are better together.

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:

- [COVID and Financial Hardship in Florida - 2023 ALICE Report](#)
- [Florida ALICE Interactive Dashboards](#)
- [ALICE Economic Vitality Dashboard](#)
- [ALICE Economic Vitality Dashboard – How to use tour](#)
- [Florida - ALICE State and County Household Budgets 2021](#)
- [Florida ALICE County Reports \(search by zip code\)](#)

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

Mission Statement Mobilizing the power of our community to break the cycle of poverty

Who We Serve

ALICE



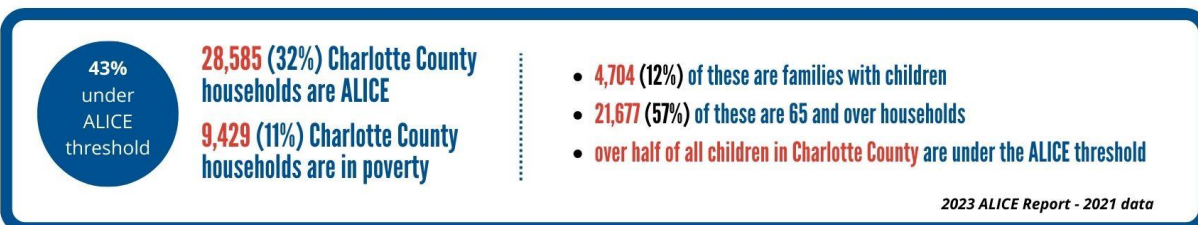
ASSET LIMITED



INCOME CONSTRAINED



EMPLOYED



Charlotte County is **one of 11 counties** in Florida that ranks high for both social vulnerability and for climate hazards (e.g., hurricanes). Charlotte County is also **in the top 20%** in the nation when it comes to social vulnerability to environmental hazards.



unitedwayccfl.org

UNITED WAY OF CHARLOTTE COUNTY PRIORITIES

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, healthcare, crisis care
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

[Learn more about our strategic priorities here.](#)

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.

IMPORTANT NOTES ABOUT 2024-2026 GRANT CYCLE

Our investment streams are open to eligible nonprofit partners 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 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. Your request should be mindful of the potential distribution amongst multiple agencies.
- Agencies are limited to applying for no more than two programs through BOCC/COPG funding.
- Religious organizations are eligible to apply under the following:
 - Organization meets all other criteria and are requesting funding towards a program offered to the community
 - Funds are not to be used for promoting religion or religious content or inhibiting another religion
 - Funding should focus on programs and services being offered, not church operations or salaries
- Funding cycle for approved programs will run from **October 1, 2024 – September 30, 2026**. Funding from October 1, 2025, through September 30, 2026 will be contingent on program performance and continued availability of funds.
- Attendance at the Grant Workshop March 5, 2024, 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 2024-2026 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.

ELIGIBILITY

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 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 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:**

- Attend the mandatory training on March 5, 2024
 - 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**.
- 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 based on panel feedback.
 - 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 **October 1, 2024 – September 30, 2026**. (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 5, 2024, followed by completing an Intent to Apply, submitted no later than 4:00 p.m. on Friday, March 15.

Submission of the Grant Application and all required attachments via the UWCC online portal must be completed by 4:00pm on Friday, April 5, 2024. **Late submissions will NOT be accepted.**

Required items:

- Grant Application
- Agency Budget
- Agency Organizational Chart
- Agency Board of Directors List
- Program Budget (template to be provided)
- 2022-2024 Final Program Report (for all currently funded agencies)
- Demographic Data (template to be provided)
- 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.

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

In addition, SCORE mentors will be available to assist with different components of the grant application packet. This information will be provided and agencies are encouraged to take advantage of this offer, but it is up to the agency to initiate this.

Once submitted, each application will go through a third-party review to pre-screen that all required materials have been provided with potential exclusion from moving forward to the panel process.

Community Impact Panels will be conducted in May 2024. Funding award notifications will be provided in August 2024.

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.

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, formal written notification should be provided to UWCC Staff and Board of Directors immediately.

In addition, the funds provided can only be used for agreed upon purpose. If funds are received from a different source, formal written notification should be provided to UWCC Staff and Board of Directors.