



# COMMUNITY IMPACT INVESTMENT GUIDELINES

2026 - 2028



**UNITED WAY**  
Charlotte County

[www.unitedwayccfl.org](http://www.unitedwayccfl.org)



## 2026 - 2028 COMMUNITY INVESTMENT GUIDELINES Board of County Commissioners

### OVERVIEW

United Way Charlotte County's (UWCC) mission is mobilizing the power of our community so all can thrive. In partnership with local agencies, businesses, and volunteers, United Way Charlotte County addresses the community's most pressing challenges by aligning resources, investing in effective programs, and providing direct support where it is needed most.

As a collaborator and convener, UWCC recognizes that meaningful community investment extends beyond dollars granted. True impact is built through shared responsibility, shared learning, and shared success. Organizations funded through the 2026–2028 Community Investment Grants can expect an engaged and supportive partner committed to strengthening outcomes across Charlotte County. Lasting progress happens when we work together.

### ALICE FOCUS

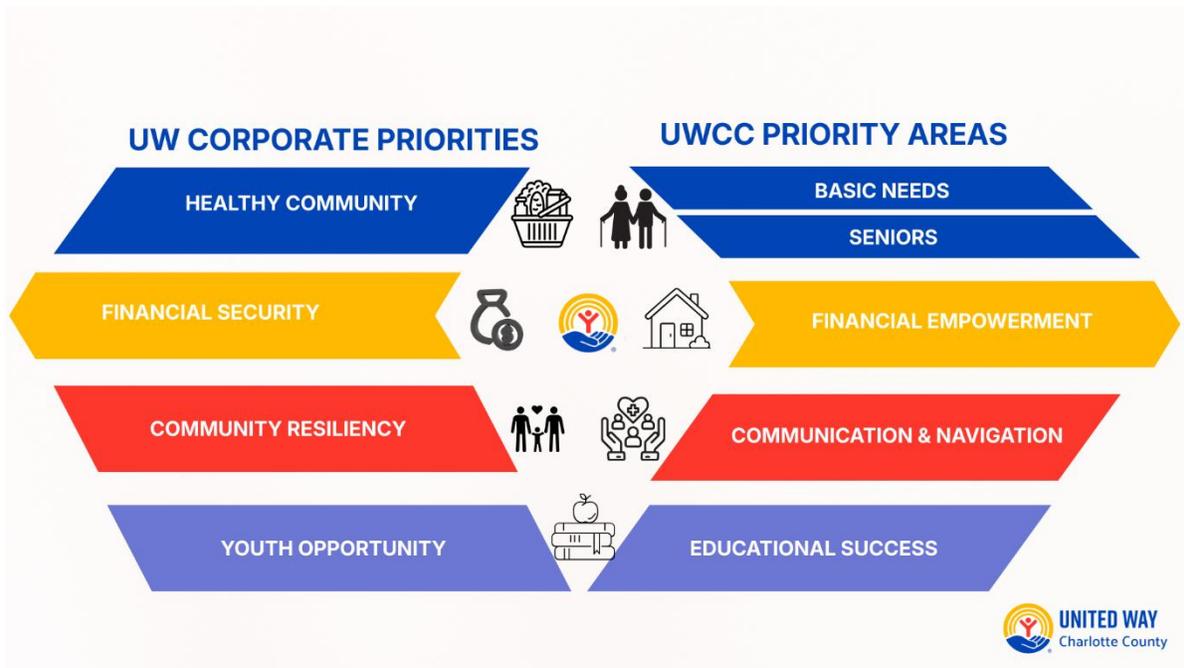
United Way Charlotte County focuses its work on ALICE® (Asset Limited, Income Constrained, Employed) the growing number of hardworking individuals and families who earn above the federal poverty level yet still cannot afford basic necessities such as housing, childcare, food, transportation, healthcare, and technology. These essential members of our workforce often face financial instability while continuing to keep our local economy and community functioning.

Applicants are strongly encouraged to familiarize themselves with ALICE data and assess whether their programs effectively serve this population. For more information about how poverty affects our community, learn about ALICE at [www.unitedwayccfl.org/alice](http://www.unitedwayccfl.org/alice)

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

# UNITED WAY 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:



Funding requests must support programs aligned with one of the following priority areas: **Basic Needs, Educational Success, Financial Empowerment, Seniors, or Communication & Navigation.** This 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 2026-2028 GRANT CYCLE

The Community Investment Grant Cycle is competitive and open to eligible 501(c)(3) nonprofit organizations. Applicants are encouraged to review these guidelines carefully before applying.

- Funds may be requested to support new or existing programs.
- Agencies are encouraged to submit requests of \$5,000 or more. While there is no maximum request amount, funding is limited and requests should be mindful of distribution across multiple agencies.
- Agencies may apply for **one program** through BOCC funding.
- Religious organizations are eligible provided that:
  - The organization meets all other eligibility criteria and program serves the broader community.
  - Funds are not used to promote religious doctrine or inhibit another religion.
  - Funding supports program services, not church operations or religious salaries.
- The funding cycle runs from October 1, 2026 – September 30, 2028. Second-year funding is contingent upon satisfactory program performance, Community Impact Panel review, and continued availability of funds.
- Grant funds may be used to support direct programmatic activities and positions that are essential to the delivery of services and achievement of funded outcomes.
- Grant funds may not be used to support executive, administrative, or general management salaries, including positions primarily responsible for organizational oversight, finance, human resources, or operations.
- Attendance at the mandatory Grant Workshop on March 11, 2026 is required prior to submitting an application.
- Applicants must submit realistic projections of clients to be served during the funding cycle. Significant under- or over-estimation may raise concerns during panel review.

### Our investment process principles are:

- **Accountability:** UWCC and funded partners share responsibility for adhering to guidelines, meeting deadlines, and reporting accurate and timely data.
- **Collaboration:** Working together around a clear, measurable vision to address priority issues and strengthen community outcomes.
- **Commitment to Results:** Using data to drive continuous improvement and measurable impact within funded programs.
- **Shared Learning and Training:** Engaging in ongoing learning opportunities and peer collaboration to enhance program effectiveness.
- **Transparency:** Maintaining open communication and clear performance expectations throughout the funding cycle.

Partners who receive funding through the 2026–2028 Community Investment Grants can expect an engaged and collaborative relationship with United Way Charlotte County. UWCC is committed to sharing expertise, learning alongside funded agencies, and strengthening coordination to maximize impact for Charlotte County residents.

### Requests for Program Grant funding must meet the following requirements:

#### Program must:

- help reduce financial instability for ALICE households and economically vulnerable residents.
- 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 population.
- directly align with one of the listed community priority areas or address 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 Grant Workshop on March 11, 2026.
- maintain active 501(c)(3) tax-exempt status and remain in compliance with all applicable federal, state, and local laws and regulations.
- provide the most recent board-approved IRS Form 990 and the following financial documentation:
  - Annual revenue of \$500,000 or more: Independent audit required.
  - Annual revenue under \$500,000: Independent review or CPA-signed compilation accepted.
- maintain administrative expenses below 25%, as reflected in the most recent IRS Form 990.
- be governed by an active, volunteer board representing Charlotte County, that meets at least quarterly and maintains systematic term rotation. Board minutes must be made available to UWCC upon request.
- demonstrate sound financial management practices.
- maintain non-discriminatory policies in staffing, volunteer engagement, and service delivery.
- submit required monthly and milestone reports in accordance with grant guidelines.
- agree to abide by the terms of the Partner Funding Agreement.
- As a condition of accepting Program Grant funding, the partner agency must be willing to revise program outcomes and budget expenditures based on Community Impact Panel feedback.
- If awarded funding, the agency agrees to submit required reporting on agreed-upon outputs and outcomes in accordance with grant guidelines.

## APPLICATION PROCESS

A full timeline for the application process is available at [www.unitedwayccfl.org/grants](http://www.unitedwayccfl.org/grants).

- **March 11, 2026** – Mandatory Grant Workshop
- **March 20, 2026 (4:00 p.m.)** – Letter of Intent (LOI) Due
  - Submission of an LOI does not guarantee invitation to submit a full application.
- **April 17, 2026 (4:00 p.m.)** - Full Application and Required Attachments Due
  - Late submissions will not be accepted.
  - Submission of a complete application does not guarantee funding.
- Applications undergo pre-screening for completeness. Incomplete applications may be excluded from panel review.
- **May 2026** - Community Impact Panel Review
  - Includes scoring of application materials and a site visit.
- **End of August 2026** - Notification of funding decisions.

Technical support is available from United Way Charlotte County staff throughout the process. SCORE mentors are also available to assist; agencies are responsible for initiating that support.

## REQUIRED ITEMS

Applicants should have the following documents prepared and available for upload at the time of application:

- A copy of the agency's current IRS Determination Letter confirming 501(c)(3) status.
- Financial documentation as follows:
  - Organizations with annual revenue of \$500,000 or more: Most recent independent audit.
  - Organizations with annual revenue under \$500,000: Most recent independent review or CPA-signed compilation.
  - Submission of the signed auditor's opinion page and any reported findings or management letter is sufficient.
  - If exempt from audit, review, or compilation requirements, a typed statement on official letterhead confirming the exemption.
- A copy of the most recent board-approved IRS Form 990 or 990EZ.
  - If the organization is not required to file a Form 990 or 990EZ, provide financial statements and a typed statement on official letterhead confirming the exemption.
- Most recent board-approved agency statement of financial position.
- Most recent board-approved income statement (profit and loss statement).
- Current fiscal year agency budget.
- A copy of the agency's most recent Annual Report (if available).
- A current roster of the agency's Board of Directors.
- Most recent Strategic Plan.

## 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 an agency is unable to fulfill the Program Grant as outlined in the Partner Funding Agreement, formal written notification must be provided immediately to United Way Charlotte County staff and the Board of Directors. Additionally, if funding for the same program or purpose is secured from another source, written notification must be submitted promptly to United Way Charlotte County.