

2016-2017 Community Investment Grants Letter of Intent (LOI)

A. Overview

United Way of Williamson County (UWWC) has a bold vision: **a community where people thrive, live healthy lives and have the opportunity to achieve their full potential.**

Partnering with agencies in the community that focus on our goals and outcomes in the areas of education, income, health and basic needs – the building blocks for a good life – we will work to create long-lasting changes that inspire hope and create opportunities for a better tomorrow.

The UWWC Letter of Intent (LOI) is the initial phase in the process which allows applicants to demonstrate how their project or program will offer the most promise towards achieving the UWWC Impact Goals and Outcomes. Following review of the LOIs, selected organizations will be invited to submit a full Community Investment Grant Application for the final round of evaluations. Final approval of the Community Investment Grants will be made by the UWWC Board of Directors at their May 2016 Board meeting.

B. UWWC Impact Areas, Goals and Outcomes

United Way of Williamson County Impact Goals and Outcomes articulate what UWWC intends to achieve when investing community dollars. Applicants must demonstrate in the LOI how their project or program will help achieve at least one of the Outcomes listed below.

Area	Goals	Outcomes
Education	Increase percentage of children who enter school (kindergarten) ready to learn.	<ol style="list-style-type: none"> 1. Parents/guardians/care givers use acquired knowledge to improve their child's academic preparedness. 2. Children enter school with the necessary foundational skills needed to begin pre-kindergarten and kindergarten learning.
	Increase the percentage of young people graduating from high school on time.	<ol style="list-style-type: none"> 1. Youth will have improved self-esteem, better classroom behavior, reduced truancy and increased interest in school. 2. Youth demonstrate improved school academic performance in one or more core subjects. 3. The family/ caregiver of at-risk youth will be more involved in their child's learning and development.
Income / Financial Stability	Increase income, assets and job training for improved employability.	<ol style="list-style-type: none"> 1. Individuals use their acquired knowledge to improve their financial stability. 2. Individuals utilize their training, support, education and credentials to obtain a position in a field that provides a sustainable wage. 3. Individuals make sound financial decisions that result in increased savings and assets.

Health	Increase access to prevention programs	<ol style="list-style-type: none"> 1. Individuals use their acquired knowledge to better manage their chronic disease. 2. Children and adults that have been affected by physical, sexual or domestic abuse/violence will feel safe and be able to rebuild their lives. 3. Seniors with limited resources will feel less isolated, maintain good health and continue to live in their own home or that of a family member.
	Increase access to quality primary care (prenatal through adult)	<ol style="list-style-type: none"> 1. Uninsured Williamson County residents will have access to a medical home and will not need to use the Emergency Room for non-emergency medical care.
Basic Needs	Address nutrition, utilities and housing needs across the county.	<ol style="list-style-type: none"> 1. Individuals and families in crisis will have their immediate basic needs met.

C. Partnerships (UWWC is interested in community partnerships, however this is not required.)

United Way of Williamson County welcomes a LOI that is a joint submission from two or more agencies that demonstrate collaboration in addressing the goals and outcomes outlined in section B.

D. Funding

UWWC Community Investment Grants are for one year only. Awards will be a minimum of \$10,000 and will not exceed \$40,000 per agency. Grant contracts for funding will begin July 1, 2016 and end June 30, 2017. Projects and programs funded for this grant period are not guaranteed continued funding in future years. To this end, proposals should build in plans for project/program sustainability.

E. Eligibility Requirements:

NOTE: Do not submit an LOI unless all of the following conditions apply.

- The organization is an incorporated nonprofit organization under the laws of the state of Texas and has tax-exempt status under section 501(c)(3) of the Internal Revenue Service code.
- The organization has a Board of Directors that is an active, representative voluntary governing body, with regular meetings and is responsible for developing its mission, determining its strategic direction and providing oversight.
- The organization has bylaws that state the purpose of the organization, make provisions for the size of the Board of Directors and provide rules for selection, tenure, number of officers and committees, financial and legal procedures, conflicts of interest and quorum requirements.
- The Board of Directors is responsible for ensuring that sufficient funds are available for the organization to meet its objectives.
- The organization has proof of adequate liability insurance coverage for the agency and will indemnify UWWC, its volunteers and staff from any and all liability for any damage or injury caused to any employee, client, patron, agency, visitor or guest of the agency.
- The organization can submit, when requested, an audit (financial review if budget is less than \$100,000) prepared by an independent certified public accountant in compliance with generally accepted auditing standards as applied to nonprofit organizations.
- The Board of Directors has inspected and approved the annual audit, or review, as well as IRS Form 990.
- The organization has and maintains a balanced budget, or has an agreed upon plan for meeting all deficits.
- The organization provides funded services **in** Williamson County and its services are culturally sensitive and barrier free.
- The organization has identified projects or programs that fall within the scope of one or more of UWWC's Impact Goals as identified in section B.
- The organization has the mechanisms and capacity for regularly reporting measurable, qualitative and quantitative outcomes.
- The organization can adhere to the UWWC funding agreement including all documentation and reports by established deadlines.
- The organization demonstrates reasonable efficiency in program management and adequacy of resources, both in materials and in personnel (voluntary and paid) to sustain a quality level of service.
- The funding request to UWWC does not extend to individuals, civic, religious or political institutions, school fundraisers, capital campaigns or endowments, sponsorships or event fundraisers or sports events.

F. Review Process

The Community Impact Council (CIC), a group of community volunteers, oversees the grant application process as follows:

- 1.) UWWC staff proofs all submissions for timeliness and completeness. LATE OR INCOMPLETE SUBMISSIONS WILL BE REMOVED FROM THE LOI/GRANT APPLICATION PROCESS.
- 2.) CIC volunteers review the LOIs and determine which applications will advance to the full Community Investment Grant application process. (CIC volunteers are not limited to a specific number of advanced applications.)
- 3.) Advancing LOI applicants are invited to submit a full Community Investment Grant application.
- 4.) Following submission and review of the Community Investment Grant applications, agencies will be asked to make a presentation about their Community Investment Grant application to CI Review Panel volunteers.
- 5.) CI Review Panel volunteers will continue their review, evaluation and discussion of the Community Investment Grant applications, and develop a final recommendation for funding to the UWWC Board of Directors.
- 6.) UWWC Board of Directors will vote on the final list of Community Investment Grants.

G. Timeline

Date	Activity
December 2, 2015	LOI issued
January 8, 2016	LOI training session at UWWC Office 9:00-10:00 a.m. (attendance is optional and not required for LOI submission) <i>Register by emailing info@unitedway-wc.org.</i>
January 13, 2016	LOI training session at UWWC Office 2:00-3:00 p.m. (attendance is optional and not required for LOI submission) <i>Register by emailing info@unitedway-wc.org.</i>
January 21, 2016	Completed LOI Application Packet is due at UWWC via email to leann@unitedway-wc.org before 5 p.m. LATE SUBMISSIONS NOT ACCEPTED.
February 1-22, 2016	UWWC Community Impact Council (CIC) volunteers to review LOIs
February 24, 2016	Agencies notified – denial & advancing letters
February 24, 2016	Grant Application available to advancing agencies
March 1-18, 2016	UWWC staff available to assist agencies with completion of Grant Application by appointment only.
March 24, 2016	Completed Grant Application is due via email to leann@unitedway-wc.org before 5 p.m. LATE SUBMISSIONS NOT ACCEPTED.
April 1-8, 2016	CPA review of Applicants' financial documents.
April 1-23, 2016	Community Investment Review Panel volunteers review all Grant Applications.
April 23, 2016 (tentative date)	Community Investment Review Panel volunteers meet to hear agency presentations, discuss, rate and rank Grant Applications.
May 9, 2016	CIC volunteers meet to make final decisions and prepare recommendations to UWWC Board of Directors.
May 18, 2016	UWWC Board of Directors vote on final approval of CIC recommendations.
May 20, 2016	Agencies notified.
July 1, 2016	New fiscal year funding/contract begins

Letter of Intent Outline & Application Packet

Required Components of the Letter of Intent (LOI) Application Packet

- Completed Cover Page (provided).
- Completed Outcome Checklist (provided).
- Letter of Intent Outline provided in this Application Packet.
- Signature of Executive Director/Chief Executive Officer.
- Attach a one page project/program budget that shows all funding sources and expenses.
- Attach a copy of the organization's IRS 501(c)(3) Letter of Tax Exempt Status.
- Attach a current list of the Board of Directors with addresses.
- Attach a list of the Board of Directors 2016-2017 meeting schedule.

**Do not include additional items, marketing materials, newspaper articles, etc. These items will not be considered during the LOI evaluation process.

Combine all LOI documents listed above (LOI Application Packet) into one(1) .pdf file and e-mail the packet to LeAnn Powers (leann@unitedway-wc.org) by 5:00 p.m., Thursday, January 21, 2016. Note: ONLY electronic submissions will be accepted. The time of submission is the date & time indicated in the Inbox of LeAnn Powers, not the Sent time of the Sender. Late or incomplete submissions will not be accepted.

Letter of Intent Outline Instructions

The UWWC Letter of Intent (LOI) is a thorough snapshot of the project/program for which you are requesting grant funds.

You must use the LOI Outcomes Checklist & Outline provide in the following pages.

The LOI Outline should be concise yet provide a thorough overview.

The LOI Outline should give a clear idea of the program/project, projected outcomes and how it will clearly meet a need in Williamson County.

Additional instructions:

- The LOI Outline must be no more than four pages (this holds true ONLY for the LOI Outline and **does not** include the Cover Page, the Outcomes Checklist, the Checklist/Signature page or any other required items.)
- One (1) inch margins on all sides.
- Please use Arial font with the font size no less than 10pt and no more than 13pt.
- Italics & bold are allowed.
- Print out the Checklist/Signature page and be sure that it is signed & dated by the ED/CEO. Scan this signed & dated document to be included in the final emailed packet.
- Be sure to include the following (again, these items are not counted as part of the above noted page limitation for the LOI Outline):
 - ✓ A 1-page project/program budget that shows all funding sources for this project/program.
 - ✓ A copy of the organization's IRS 501(c)(3) Letter of Tax Exempt Status.
 - ✓ A current list of Board of Directors **with** 2016 -2017 meeting schedule.
 - ✓ Do not include any additional items or materials than those listed above.

**Note: Two LOI training sessions will be offered at UWWC offices. Attendance is optional and not required for LOI submission. Dates & times: January 8, 2016, 9:00-10:00 a.m. or January 13, 2016, 2:00-3:00 p.m. Registration is required to adequately ensure space. RSVP to info@unitedway-wc.org.*