

United Way of the Midlands

LETTER OF INTENT GUIDE

Thank you for your interest in United Way of the Midlands Community Care Fund.

UWM is committed to investing in program beginning July 1, 2024 for a two-year cycle ending June 30, 2026. The two-year investment cycle is intended to lay a foundation that will assist programs in their efforts to continuously improve and track outcomes over time. However, the continuation of funding for programs after the first year in the investment cycle is contingent upon the adherence to all requirements in the Grant Agreement and availability of UWM funds.

A Full Partnership Guide Will Be Provided to Organizations Invited to Apply for Funding

MISSION

Our mission is to **Unite** our community's **Caring Spirit** to build a **Stronger** tomorrow.

In support of our mission United Way of the Midlands' (UWM) Community Care Fund is focused on addressing social and economic disparities across the Omaha-Council Bluffs metro area. This fund was established to support a broad portfolio of impactful area programs-ensuring our community has a strong network of health and human services that form a Circle of Support. This fund is powered by the generosity of more than 40,000 individual donors and funding awards are determined by a review committee of subject matter experts and active citizen volunteers seeking to direct dollars where they are needed most.

Our Focus Areas Include:

- **Basic Needs:** Crisis Response, Health and Well-Being
- **Education:** Youth and Family Engagement
- **Financial Stability:** Economic Mobility

Please click [here](#) to review program funding areas, priorities and required metrics.

COMMUNITY CARE FUND PROCESS

1. Letter of Intent

The Letter of Intent will be available to agencies on October 2 and can be completed online at [united_way_midlands_community_care_fund_application\(webportalapp.com\)](https://united_way_midlands_community_care_fund_application(webportalapp.com)). The LOI must be completed by 5:00 p.m. on October 31. Late or incomplete LOI's will not be accepted. Agency training regarding LOI content and the WizeHive system can be found under the Important Dates section below.

2. Due Diligence Meetings

Due Diligence Meetings will be held with UWM Community Investment staff from November 1-December 21 with all qualifying LOI submissions. A member for the CI team will reach out to your designated contact (as per your LOI) with a date and time for your Due Diligence meeting. These meetings are intended to flush out any potential questions or clarifications prior to application submission. Based on the Due Diligence meeting your program will be invited to apply for the UWM Community Care Fund.

3. Grant Application

The Grant Application will be available to agencies on January 8 and can be completed online. You will receive an email inviting you to apply for the application via the WizeHive account that you created upon the submission of your LOI. The application must be completed by 5:00 p.m. on January 31. Late or incomplete applications will not be accepted. Agency training regarding application content, financial requirements and the WizeHive system will be held in early January.

4. Evaluation and Review

The grant application provides reviewers details regarding the program's budget, work plan, expected impact, and community data that supports the need. The information submitted through the proposal will be reviewed by UWM staff and volunteer reviewers to determine how well your services align to UWM's Goals and Strategies. As questions arise during the review, Q&A will be posed to your agency.

5. Final Review

In May, UWM staff and volunteers convene to make investment recommendations. Each review team's lead represents the team as part of the CIRT Committee. The CIRT Committee review investment recommendations from each team to create a balanced, comprehensive investment portfolio in alignment with UWM's GOALS. The investment portfolio is carried forward to the UWM Board of Directors for approval. To learn more about the CIRT process please visit our website: [Community Investment Review Team - United Way of the Midlands \(unitedwaymidlands.org\)](https://unitedwaymidlands.org)

6. Investment Decisions

The Board of Directors reviews and approves the final investments in June. Grant Agreements will be shortly after Board approval is received, with funding beginning on July 1, 2024.

ELIGIBILITY

An organization is required to submit one LOI and application for each unique, clearly delineated program for which they are seeking support. UWM does not fund organizations, we provide grants to programs.

- Have 501c3 (not-for-profit) status, or a 501c3 fiscal sponsor
- Programming primarily serves economically vulnerable populations
- Programming primarily serves the Omaha Metropolitan area. *Note: We prioritize investments in specific communities within the Omaha Metropolitan area to maximize our impact.*
- Programming focused on one of the following: Crisis Response, Health and Well-Being, Youth and Family Engagement, Economic Mobility. *Please click [here](#) to review funding areas, priorities and required metrics.*
- UWM investment request cannot exceed 50% of the total program budget.
- Organizations with revenues over \$500,000 must submit board approved financial statements and 990.
- Commitment and ability to report required client-level demographics are results based accountability metrics for each funded program.

We do not allow the following: Sponsorships, annual funds, galas, or other special event fundraising activities, conferences or events, capital campaigns or new building construction ("bricks and mortar"), debt reduction, endowment funds, dissertations, theses or student research, sectarian religious activities, political lobbying, or legislative activities, support to individuals including tuition, loans, fellowships, or grants, strategic planning or community research, collective impact/backbone organizations.



Other Considerations

UWM is prepared for a record volume of applications and expects a highly competitive review process with requests far outpacing the amount available to invest. If you are submitting a request for funds for a program that has not received support from UWM in the past you can ask for \$25,000 in support. It should be noted that an agency can only apply for funds for one program not previously supported by UWM.

Most grant awards for returning applicants will fall between \$50,000-\$75,000.

IMPORTANT DATES

Please be aware of the following key dates in the RFP process:

- LOI Preparation meetings: September 25 at 9:00 a.m. and September 28 at 2:00 p.m.—email communityinvestment@uwmidlands.org to receive an invitation to a virtual preparation meeting.
- LOI submission deadline: October 31, 2023
- Due Diligence meetings: November 1-December 21, 2023
- Application Preparation meetings: early January
- Application submission: January 8-January 31, 2024
- Community review period: February 1-May 31, 2024
 - During this period clarification questions may be asked
- Announcement of awarded proposals: June, 2024

Due to the competitive nature of the grant process it is incumbent upon applicants to be proactive in checking their email and the submission portal and UWM website for updates. UWM will post relevant FAQs and information session dates and times on our website. <https://unitedwaymidlands.org/>

IMPORTANT SUBMISSION NOTES

We encourage you to submit your LOI well before the deadline to ensure a smooth investment process.

- Once the LOI period has ended you will not have an opportunity to revise your LOI. The opportunity to clarify or revise your request may be done through the due diligence meeting and application.
- After submission of the LOI, you may decrease your request but you may not increase it.
- Questions may be asked throughout the process in order to gain clarification and assess alignment with UWM priorities. Please make every effort to be responsive and ensure your contact information is up to date.
- Failure to provide a complete LOI may result in removal from the process. Only submitted LOIs will be considered.

A Full Partnership Guide Will Be Provided to Organizations Invited to Apply for Funding
The guide will review program partnership and reporting requirements



UNITED WAY OF THE MIDLANDS

LETTER OF INTENT FORM

Please complete form using the [online portal](#).

This version is available for background and planning purposes only.

*Please remember to **SAVE** often.*

Before proceeding please ensure alignment with UWM priority areas by reviewing the areas and required reporting metrics [here](#)

AGENCY INFORMATION

This information is being pulled from the profile form. If this information has changed, please update the fields below, and edit your profile to include the updated information.

Agency Name

Please ensure the legal name of your organization is correct. If using a fiscal agent, the name of the fiscal agent should be in your profile.

Year Established

Please ensure the year is accurate. This should be the year your organization received its IRS 501c3 designation.

Mission Statement

Please ensure your organization's mission statement is correct. If you do not have a mission statement you may insert your vision statement.

EIN

Please ensure your EIN is correct.

PRIMARY CONTACT INFORMATION

Primary Contact First Name

Enter the first name of the primary contact regarding this application.

Primary Contact Last Name

Enter the last name of the primary contact regarding this application.

Primary Contact Email Address

Enter the email address for the primary contact regarding this application.

Are you intending to apply for UWM's 2024-2026 Community Care Fund?

Select Yes or No

Note: If you respond no, you will not be

invited to complete an application.



PROGRAM INFORMATION

Program Name

Please note that a separate Letter of Intent (LOI) is required for each program for which you are seeking funding.

Primary Funding Area

Use the matrix [here](#) to select from one of the following:

Crisis Response - Health and Well Being – Youth and Family Engagement - Economic Mobility

How many clients do you anticipate serving in this program in total over the first 12 month period of the grant?

A number is required here

Amount Requested

A dollar amount is required here reflecting your requested investment from United Way

Note: Requests should be at least \$25,000. New programs may not request more than \$25,000. The UWM portion of programming amount requested should be no more than 1/2 of total program budget. Note: This should be a one year amount.

Total Program Budget

A dollar amount is required here reflecting the total budget for your program. *Note: This should not be the same as your total organizational budget. Keep in mind, the UWM portion of programming amount requested should be no more than 1/2 of total program budget. This should be a one year amount.*

UWM Portion of Programming (Amount requested should be no more than 1/2 of total program budget)

The percentage will automatically populate. Keep in mind, the UWM portion of programming amount requested should be no more than 1/2 of total program budget

Describe the program for which you are requesting funds.

Your description should include the overall purpose of the program and a brief overview of the services or activities offered and client population served. Ensure the program aligns with UWM funding priorities. *300 word maximum.*

How will the majority of UWM dollars be used?

Please select the option that best describes the expenses that UWM funds will support: General Program Operating, Specific Program Salary, Program Supplies and Equipment, Program Direct Assistance, Other Program Expense

Note: In the full application you will have an opportunity to provide a compelling case for why UWM funds are essential to your program.

For this program, what funding have you received from UWM in the past 12 months?

Select all that apply. Only one new program is allowed. Select from: EFSP – ARPA – CCF – DEI – Karnett – Goodfellows – Other - Not Previously Funded



I understand a due diligence meeting is required before moving forward in the grant process. I certify the information above is accurate and that typing my name below serves as my electronic signature.

Select Agree

Signature

Type the name of the person completing the form

Date

Provide the date

DUE DILLIGENCE MEETING SCHEDULING CONTACT INFORMATION

Provide the name, email address and phone number for the best point of contact for UWM to arrange a due-diligence meeting. All applicants are required to complete a due-diligence meeting.

Meeting Contact Name

Provide the name for the best point of contact for UWM to arrange a due-diligence meeting

Meeting Contact Email Address

Provide the email address for the best point of contact for UWM to arrange a due-diligence meeting.

Meeting Contact Phone Number

Provide the phone number for the best point of contact for UWM to arrange a due-diligence meeting.

SUBMISSION

Save often in the system as you go

Mark the LOI as Complete

Note: You will not be able to submit without marking the LOI as complete

Click submit on the main Letter of Intent Intake Page

You should receive an automatic email confirming your submission