

United Way of the Midlands KARNETT TRUST REQUEST FOR PROPOSALS

United Way of the Midlands is pleased to announce the opening of the 2025-2027
Karnett Trust Request for Proposals (RFP).

**Accepting Letters of Intent (LOI) for Program Funding
January 13 - January 31.**

Application Submission to follow based on LOI approval.

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

In 2012, the United Way of the Midlands Foundation received a legacy gift from Ellen C. Karnett Trust. This Trust is a generous gift to the community, making an impact through grants to programs serving children with intellectual and/or developmental disabilities and their families and caregivers.

Eligible agencies are those providing care, education, or training to children and youth (up to age 24) with intellectual and/or developmental disabilities and their families and caregivers within the greater Omaha-Council Bluffs metropolitan region.

Definition and Funding Goals

United Way of the Midlands has adopted the definition of Intellectual Disabilities from the American Association of Intellectual and Developmental Disabilities:

“Intellectual disability is a condition characterized by significant limitations in both **intellectual functioning** and **adaptive behavior that originates before the age of 22**.

Intellectual Functioning

Intellectual functioning—also called intelligence—refers to general mental capacity, such as learning, reasoning, problem solving, and so on.

Adaptive Behavior

Adaptive behavior is the collection of conceptual, social, and practical skills that are learned and performed by people in their everyday lives.



- Conceptual skills—language and literacy; money, time, and number concepts; and self-direction.
- Social skills—interpersonal skills, social responsibility, self-esteem, gullibility, naïveté (i.e., wariness), social problem solving, and the ability to follow rules/obey laws and to avoid being victimized.
- Practical skills—activities of daily living (personal care), occupational skills, healthcare, travel/transportation, schedules/routines, safety, use of money, use of the telephone.
- Standardized tests can also determine limitations in adaptive behavior.

Karnett Trust investments have the goal of supporting programs that provide care, education, and training to children/youth with intellectual and/or developmental disabilities (up to age 24), as well as their families and caregivers. Examples of each of these areas of focus include but are not limited to:

- **Care**
 - Healthcare including early screenings, diagnosis, and therapy
 - Respite care for guardians and caregivers
 - Supporting or providing activities of daily living, including bathing, feeding, and dressing
 - Providing safe spaces for children with intellectual and/or developmental disabilities to be cared for when primary caregivers are unavailable
 - Opportunities for meaningful social interaction and inclusion for children with intellectual and/or developmental disabilities
- **Education**
 - Provision of academic education or supplementary aids and services
 - Activities that encourage learning or developing life skills, physical activity, or other adaptive skills such as personal care, communication, or being safe
- **Training**
 - Programs or activities that provide training to children with intellectual and/or developmental disabilities to support independence or job skills
 - Training for parents, guardians, and caregivers to better care or advocate for children with intellectual and/or developmental disabilities
 - Training for professionals working with children with intellectual and/or developmental disabilities

Eligibility

Eligible nonprofit agencies must be certified as tax exempt under Section 501(c)(3) of the Internal Revenue Code.

- Programming providing care, education, or training as defined above
- Serving the Omaha-Council Bluffs metro area



- At least 50% of program participants should meet the following criteria: children and youth (up to 24 years old) with intellectual and/or developmental disabilities. Services may extend to their families and caregivers. *Note: priority will be given to programs serving 100% of participants meeting the listed criteria.*
- 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

In our commitment to steward funds efficiently and responsibly, and to ensure grants are making a meaningful impact, **grants will exclusively be funded at the \$25,000 level on a two-year cycle.** We kindly ask that any letters of intent submitted reflect this funding level.

Please note, agencies receiving Community Impact Fund investments are eligible to apply; however, not for the specific programs receiving funding through the Community Impact Fund.

Investment Policies and Approach

UWM has adopted the following investment policies and approach:

- The Community Investment process is grounded in UWM’s guiding principles of trust, grace, grit, openness, engagement, and curiosity. All UWM staff and volunteers are expected to uphold and demonstrate these values.
- UWM invests in programs with diverse funding streams that include a balance of charitable gifts, foundation and other grants, governmental grants, contracts and other funding sources. **The UWM investment request cannot exceed 50% of the total program budget.**
- UWM is a member of the Commitment to Opportunity, Diversity and Equity (CODE) Coalition. CODE was born to achieve sustainable growth in the areas of diversity, inclusivity,



equity, and opportunity in Greater Omaha. By joining CODE leaders pledge to increase diversity in their organizations and to create an inclusive work environment for all employees. The CODE commitment includes creating and implementing a comprehensive diversity strategy, and hiring diverse and inclusive leadership to support that effort. Applicants are strongly encouraged to do the same.

- All applications and supporting documentation are given thorough consideration. Thus, all funding decisions approved by the UWM Board of Directors are considered final and are not subject to appeal.
- Though investments made through the Karnett Trust are not required to focus on individuals and families that are at risk for or in poverty, programs with this focus will be prioritized.

2025-2027 Karnett Investment Process

As the trusted steward of these funds UWM will utilize a strategic approach, outlined below, to ensure sustained support and long-term impact for programs aligning with the trust's objectives.

1. Letter of Intent

The Letter of Intent will be available to agencies beginning January 13, 2025, and can be completed online through our grant management software Wizehive. A virtual training regarding the LOI and the Wizehive system will be held on January 8, 2025. Please reach out to communityinvestment@uwmidlands.org for a link to this Teams training. A LOI Guide will also be made available.

Letters of Intent are due January 31, 2025, 5:00 p.m. Central Time. Late submissions will not be accepted.

Letters of Intent will be reviewed by UWM staff.

To submit a Letter of Intent through our Request for Partnership, please follow these steps:

- Visit the [Karnett Page](#) on our website for the link to set up a profile in the WizeHive portal, LOI opens January 13, 2025
- The system will prompt you to complete a Letter of Intent
- **Submit your proposal by January 31st**

2. Due Diligence Meetings (may be required upon request)

Eligible agencies may be required to participate in a virtual Due Diligence meeting with UWM staff the week of February 17, 2025-February 21, 2025. The meeting is a chance for UWM to



gain more clarity about the program, and for the agency to ask additional questions of UWM. If your agency is not required to participate in a due diligence meeting, please submit any questions you have regarding the process by February 19th, 2025.

3. Grant Application based on LOI approval

The grant application will be available to agencies, who have been approved to move on to this portion of the process, on March 10, 2025. A virtual agency training regarding application content and financial reporting requirements will be held on March 5, 2025. An application guide will also be made available to agencies who move on to this phase of the process.

Applications are due March 28, 2025. Late submissions will not be accepted.

Proposals are reviewed by a team of volunteers which includes subject matter experts and UWM staff, with investment recommendations approved by UWM Board of Directors.

4. Final Review

The review team comprised of UWM staff and community volunteers will convene to make investment recommendations. Their recommendations are reviewed and approved by the UWM Board of Directors.

5. Investment Decisions

The UWM Board of Directors reviews and approves the final investments June 2025.

Timeline

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

- LOI virtual training session: January 8, 2025
- LOI opens: January 13, 2025
- **LOI submission deadline: January 31, 2025**
- Due Diligence meetings: February 17, 2025-February 21, 2025
- Application virtual training session: March 5, 2025
- Application opens: March 10, 2025
- **Application submission deadline: March 28, 2025**
- Community review period: April 2025 – May 2025
- Announcement of awarded proposals: June 2025
- Funding begins: July 2025

We encourage you to submit your proposal well before the deadline to ensure a smooth application process. Application materials and additional guidance will be provided in March.

If you have questions or need additional information, please contact us at communityinvestment@uwmidlands.org. We look forward to receiving your proposals.

