

United Way of the Midlands

Karnett Trust

LETTER OF INTENT GUIDE

Thank you for your interest in the Karnett Trust, powered by United Way of the Midlands.

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

UWM is committed to investing in programs beginning July 1, 2025 for a two-year cycle ending June 30, 2027. 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.

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

KARNETT TRUST

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.

Focus Areas Include:

- **Healthy Communities:** Improving health and well-being for all
- **Youth Opportunity:** Helping young people realize their full potential
- **Financial Security:** Building financial stability and strength
- **Community Resiliency:** Addressing urgent needs today to advance a better tomorrow

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

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

KARNETT TRUST PROCESS

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. 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.

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 in Definition and Funding Goals
- 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.

IMPORTANT DATES

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

- LOI virtual training session: January 8, 2025—email communityinvestment@uwmidlands.org to receive an invitation to a virtual preparation meeting.
- 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
 - During this period clarification questions may be asked
- Announcement of awarded proposals: June 2025
- Funding begins: July 2025

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 information and dates and times on our [website](#).

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 application.



- 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 Application 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 the Karnett Trust 2025-2027 powered by UWM?

Select Yes or No

Note: If you respond no, you will not be invited to complete an application.

PROGRAM INFORMATION

Program Name

Please note if your agency is currently funded through UWM's Community Impact Fund you must apply for a *separate* program for funding through the Karnett Trust

Primary Funding Area

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

Healthy Community – Youth Opportunity – Financial Security - Community Resiliency

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

Grants will be funded exclusively at \$25,000, do you intend to apply for this amount?

Select Yes or No from the dropdown menu

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 \$25,000 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



Please briefly describe the population this program targets for service.

Your answer should identify the specific population targeted for the services provided. I.e. Children with developmental disabilities ages 0-5, Adults with Autism, etc.

Describe the program for which you are requesting funds.

Your description should include the overall purpose of the program, a brief overview of the services or activities offered, and how the program fits into the purpose of the Karnett Trust. Please include the 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.

Did this program receive funding from UWM's Community Impact Fund in the 2024-2026 grant cycle?

This question is a dropdown with the answers: Yes or No

Note: Programs that have been awarded through the 2024-2026 Community Impact Fund (CIF) will not be eligible for funding through the Karnett Trust. Agencies with a program funded through CIF may apply for a separate program for Karnett Trust funding.

I understand a due diligence meeting is potentially 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. Some applicants may be 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

