Community Partners Grant Funding

Information Session
Fiscal Year 2021

November 13, 2019
AGENDA

1. Purpose
2. Process & Timeline
3. Eligibility & Reporting
4. Application Submission
5. Questions
Purpose

- Community Partner Grants (CPG) provide opportunity for Union County to partner with nonprofit agencies, that serve County residents, to deliver services aligned to the County objectives.

- To create a transparent and fair funding process that is accessible to all local nonprofit agencies.

*Funding is limited and subject to budget availability. Applicants (new or previously funded) are not guaranteed to be awarded funds. Successful applications may be funded for less than the amount requested.*
Process & Timeline

- **Deadline:** January 17, 2020 at 4:00 PM
- **Review Panel:** February/March 2020
- **Recommended Budget:** May 2020
- **Budget Approved (by BOCC):** June 2020
Eligibility & Reporting

- Serve the residents of Union County
- IRS 501(c)(3) nonprofit designation
- Financial statements audited by independent CPA
- Contribute to one of five strategic objectives
- Documentation supporting a diversified workforce
- Professional membership affiliation to support organizational sustainability
- Registered with Secretary of State and listed as Current/Active

*Organizations that do not meet criteria are invited to apply with an explanation related to any criteria not met.*
Financial Statements

• Prepared in accordance with Generally Accepted Accounting Principles (GAAP) and audited by an independent CPA

• CPA must issue clean, unqualified opinion
Strategic Objectives

- **Public Safety** – In concert with our community partners, provide those essential services that protect the public’s health, safety, and welfare.

- **Community Consensus** – By developing relationships based on mutual trust and understanding, engage appropriate stakeholders to identify and successfully implement programs and initiatives that reflect the community priorities.

- **Economic Development** – Through common vision and direction become a more business friendly, economically vibrant and sustainable community by fostering development of a qualified workforce and infrastructure capacity to support current and future economic sustainability and growth.

- **Sustainability** – Through collaboration with community partners, foster an environment that promotes affordability of services, conservation of resources, and preservation of a high quality of life to support and enrich a diverse and productive population.

- **Organizational Strengthening** – Develop and maintain a highly engaged workforce through shared values and clarity of purpose, with the tools, training and resources that support skills development, knowledge sharing and retention, and employee investment.
Registration with NC Secretary of State

- Status listed as Current/Active
  - No revenue suspensions
  - No overdue taxes

https://www.sosnc.gov/online_services/search/by_title/_Business_Registration
https://www.sosnc.gov/online_services/search/by_title/_Federal_Tax_Lien
Application Submission

http://unioncountync.gov/departments/budget-management

Submit to: Adrienne.Rorie@unioncountync.gov
UNION COUNTY
2020-2021 COMMUNITY PARTNER GRANT APPLICATION

SUBMISSION DEADLINE: Friday, January 17, 2020, 4 PM

BY MAIL: Union County Government
500 N. Main St., Suite # 609
Monroe, NC 28112

BY EMAIL: Adrienne Rorie, Budget Analyst
Adrienne.Rorie@unioncountync.gov

ORGANIZATION INFORMATION

Organization Name: ________________________________
Organization Type: ________________________________
Address: _______________________________________
Website: _______________________________________
Date of Incorporation: ______________________________
Years of Operation: _______________________________
Fiscal Year End Date: _____________________________

PRIMARY CONTACT INFORMATION

Name: _________________________________________
Phone Number: _________________________________
Email address: _________________________________

DIRECTOR’S CONTACT INFORMATION

Name: _________________________________________
Phone Number: _________________________________
Email Address: _________________________________

NONPROFIT CREDENTIALS

EIN: ________________________________
How many years your organization has been
certified as a 501(c)(3) nonprofit: __________________

PROJECT INFORMATION

Program/Project Name: ___________________________
Total Amount of Award Requested: __________________

FINANCIAL SUMMARY

AUDITED FINANCIAL STATEMENTS
Do you have independently CPA-audited financial statements for fiscal/calendar year 2018 or 2019? The most recent audited statements should be included with this application.

☐ Yes
☐ No. The audit will be available at a later date. Provide estimated date: __________________
☐ No. We do not and will not have an audit.

AGENCY BUDGET & FUNDING
What is the agency’s total budget for 2019-2020? What is the current fund balance and what do you anticipate it to be at the close of the current fiscal year (FY2019-2020)? Does Union County already provide any kind of financial support or in-kind assistance to the agency?

PROGRAM OVERVIEW

After selecting a Funding Category, please complete each narrative text box below. Insert “N/A” for any question that is not applicable.

FUNDING CATEGORIES

The following funding categories tie to board objectives within the County and guide decisions during the County’s budget process. Please select one of the five priorities below that best aligns to your program.

☐ Public Safety
☐ Community Consensus
☐ Economic Development
☐ Sustainability
☐ Organizational Strengthening
PROGRAM MISSION & GOALS
Please provide the mission & vision statement(s) and programming goals of the organization or program.

PROBLEM STATEMENT
Describe the identified community need(s) the service proposes to address within the strategic objective. Provide evidence (i.e., research or data findings) to support a clearly defined problem.

SERVICE GEOGRAPHY & POPULATION
Please describe the characteristics of the target population(s) that benefits directly from the service including the location within Union County where services are provided. This information should include the number of persons served by your agency and how many of those are Union County residents.

SERVICE STRATEGY
Explain the strategy that will be used to address the problem stated above. As available, provide evidence that the strategy will be successful. Include data on past performance and outside research as appropriate. Please include the method for data collection (i.e., surveys) and tracking (i.e., use of databases or other means).
SERVICE DELIVERY AND KEY ACTIVITIES
Describe the service delivery process: include staff, key activities, and timelines. Additionally, describe any operational and/or functional changes being considered in the agency to be funded for Fiscal Year 2021 (July 1, 2020 – June 30, 2021).

COLLABORATION AND PARTNERSHIPS
If applicable, describe how the service will use collaboration or partnerships to achieve results.

PROPOSED SERVICE RESULTS
Describe the results this service will deliver in Fiscal Year 2021 (July 1, 2020 – June 30, 2021) and long-term (in the next 3-4 years).

PEER REFERENCES
Please provide up to three references from peer organizations. Only contact information for the organizations is necessary.

PROFESSIONAL ASSOCIATION
To what professional association(s) does your organization belong? How does/do the association(s) support your organization’s sustainability?
**BUDGET & PERFORMANCE**

**BUDGET**
Please complete and submit the provided budget template.

**PERFORMANCE**
Please complete and submit the provided performance template.

**ADDITIONAL DOCUMENTATION**
All additional documentation should be included as an additional page or attachments when submitting applications. An agency that does not have any of the additional documentation should submit, in writing, the reason that documentation does not exist for each request.

**FUNDING SOURCES**
Include a spreadsheet of all outside funding for the past three (3) years including whether the source is public/private.

**IRS DOCUMENTATION**
Include copies of IRS Federal Tax Exemption Letter and IRS Form 990.

**CERTIFICATE OF INSURANCE**
Include Certificate of Liability Insurance.

**LEADERSHIP & STAFF**
Include a list of agency's Board of Directors and all staff members.

**SALARY DISCLOSURE**
Include documentation displaying the salary and benefits associated with each program position.

**ARTICLES OF INCORPORATION**
Include copies of Articles of Incorporation and Bylaws.

**PROFESSIONAL AFFILIATIONS**
Include confirmation of membership with a professional association.

**WORKFORCE REPRESENTATION**
Include documentation supporting the agency's effort to achieve and/or promote a diversified workforce (i.e., Diversity Policy, EEO Statement, Management Plan, etc.)

<table>
<thead>
<tr>
<th>Applicant Name</th>
<th>Applicant Title</th>
<th>Date</th>
</tr>
</thead>
</table>

I acknowledge the information in this application is accurate and represented to the best of my knowledge.
# Budget Template

## FY2021 Community Partner Grants

### Proposal Budget Summary

**Please check budget cycle:**
- [ ] Fiscal Year
- [x] Calendar

**Total Program Budget for current year:** 

**Total Agency Budget for current year:** 

### Program Budget

<table>
<thead>
<tr>
<th>Organization</th>
<th>FY 2019 Actual</th>
<th>FY 2020 Revised Budget</th>
<th>FY 2020 Budget minus FY19</th>
<th>Change</th>
<th>Percent</th>
<th>FY 2021 Total Budget</th>
<th>FY 2021 Funding Request to County</th>
<th>FY21 Budget minus FY20</th>
<th>Change</th>
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### Program Expenses

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<tr>
<th>Expense Category</th>
<th>FY 2019 Actual</th>
<th>FY 2020 Revised Budget</th>
<th>FY 2020 Budget minus FY19</th>
<th>Change</th>
<th>Percent</th>
<th>FY 2021 Total Budget</th>
<th>FY 2021 County Funded Expenses</th>
<th>FY21 Budget minus FY20</th>
<th>Change</th>
<th>Percent</th>
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<tr>
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<tr>
<td><strong>Total Expenses</strong></td>
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</tbody>
</table>
### FY2021 Community Partners Grant Proposed Performance Measures

Please list below your proposed **output** and **outcome** measures for this funding. You may add up to 3-4 output measures to the 2 that are already listed below and up to 3-4 outcome measures as well.

An **output** measure is a count of what is produced through your program (e.g. # of clients served, # lunches served, etc.). An **outcome** measure is the result of a program or service and describes impact. It is often expressed as a percentage or ratio (e.g. % of clients placed in jobs, % of children immunized by age 3, etc.).

<table>
<thead>
<tr>
<th>Output Measures (Numbers)</th>
<th>Calculation Methodology</th>
<th>FY18 Target</th>
<th>FY18 Actual</th>
<th>FY19 Target</th>
<th>FY19 Actual</th>
<th>FY20 YTD Target</th>
<th>FY20 YTD Actual</th>
<th>FY21 Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of unduplicated individuals served by Union County Community Partners Grant</td>
<td>Count</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Number of unduplicated individuals served by other funding sources</td>
<td>Count</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Outcome Measures (Percentages)</th>
<th>Calculation Methodology*</th>
<th>FY18 Target</th>
<th>FY18 Actual</th>
<th>FY19 Target</th>
<th>FY19 Actual</th>
<th>FY20 YTD Target</th>
<th>FY20 YTD Actual</th>
<th>FY21 Target</th>
</tr>
</thead>
</table>

*Please use the Calculation Methodology column to share how you will use your data to calculate a result. The calculation methodology for most output measures will be a count. The calculation methodology for outcome measures should show how you arrive at the results included in your performance history and proposed target.
Adrienne Rorie
Union County Budget Analyst
Email: Adrienne.Rorie@unioncountync.gov
Phone: (704) 283-3608
Questions
Thank you!