

# United Way of Oxford-Lafayette County



## **Call for Proposals & Community Investment Policies & Procedures Manual**

### **Fiscal Year 2026-2027 Grant Cycle**

#### **Submission Due Dates:**

Primary Fiscal Agent Pre-Application: March 10, 2026

Program & Community Coalition Grant Applications:  
April 1, 2026

## **Section 1. Community Investment Process**

### **A. Overarching Community Investment Principles**

United Way of Oxford-Lafayette County (UWOLC) is committed to investing its resources in ways that create a lasting community impact by preventing problems before they occur, prioritizing long-term solutions over quick fixes, and promoting community-wide approaches that serve all who live in the Lafayette-Oxford-University (LOU) community.

At the same time, UWOLC recognizes there are many people living in our community who are at times unable to meet their families' basic food, shelter, and medical needs. UWOLC believes no one should be without a safety net. As a result, UWOLC balances its commitment to lasting change with a focus on ensuring our community's basic needs are met. Over time, we hope more and more families achieve financial stability and self-sufficiency, ultimately reducing the demand for such services.

To maximize its community impact, UWOLC maintains high standards for its own investment process as well as the programs and coalitions that receive UWOLC funding. First and foremost, UWOLC identifies high-priority community issues through periodic community needs assessments, with input and feedback provided by LOU's diverse communities. UWOLC also ensures that available funds are awarded through a careful, fair, and thorough evaluation process that responds to those high-priority issues. Finally, UWOLC holds funded organizations fiscally responsible and requires their programs to be well-managed and engaged in outcome measurement as well as continuous program improvement.

### **B. Impact Areas**

In June 2025, UWOLC adopted the following impact areas:

**Youth Opportunity:** We create pathways for young people to reach their goals and realize their full potential.

- Early Childhood Education
- After-School and Summer Learning
- College and Career Readiness
- Literacy Development
- Family Engagement

**Healthy Community:** We improve access to quality health care, services, and education as well as nutritious food so people have the resources they need to lead healthy lives and enhance their well-being.

- Health Care Access
- Mental Health Support
- Nutrition and Food Security
- Health Awareness, Recovery, and Prevention
- Healthy Environments and Physical Activity

**Financial Security:** We connect people to education, tools, and resources so they can build a brighter future.

- Adult Education, Training, and Career Support
- Financial Guidance, Coaching, and Assistance
- Housing Access, Stability, and Security

**Community Resiliency:** We work to build a resilient community that is connected, supportive, and ready to respond to any challenge.

- Crisis Assistance and Support
- Disaster Relief and Recovery
- Emergency Preparedness
- Community Sustainability

### **C. Program & Community Coalition Funding**

UWOLC solicits applications from as well as funds specific programs and community coalitions that can demonstrate alignment with the impact areas above. UWOLC does not fund an organization's overall operations.

Awarded funds must be used exclusively to support the proposed program in Lafayette County. Eligible uses of funds include but are not limited to staff salaries, staff and volunteer professional development, equipment and material purchases, travel expenditures, and program-specific overhead costs. Other program-specific expenses may also be eligible for UWOLC funding. UWOLC does not fund bricks and mortar expenditures.

### **D. UWOLC Outcome Measurement Requirements**

UWOLC is committed to funding programs and community coalitions with clearly defined outcomes and a plan for measuring as well as responding to results. All awardees are required to measure and report on the outcomes of their funded program(s); see Program Grant Application, Community Coalition Grant Application, and Reporting Requirements for details. UWOLC will provide guidance regarding outcome measurement through an Application Workshop and other ongoing opportunities.

## **Section 2. Eligibility**

### **A. Agencies/Programs Eligible for UWOLC Funding**

UWOLC funds programs that promote youth opportunity, healthy community, financial security, and community resiliency for Lafayette County residents. Specifically, UWOLC funds programs that are aligned with the impact areas above.

UWOLC funds programs run by 501(c)(3) organizations. Exceptions to this requirement may be made for other nonprofit or public entities (e.g., libraries, schools, and universities) in the event a non-501(c)(3) runs a program that aligns with a UWOLC impact area. For-profit businesses are ineligible even if they run programs aligned with UWOLC impact areas.

The UWOLC Board of Directors has adopted a Diversity and Inclusion Statement of Principle and an Anti-Racism/Ethnic Discrimination Statement. The UWOLC accepts applications from and funds programs for which eligibility is determined in ways that reflect the referenced statements.

All organizations that receive UWOLC funding—whether community funds or designated funds—are required according to United Way Worldwide guidelines to complete an Anti-Terrorism Certification. The UWOLC will also run all organizations that receive UWOLC funding against the Anti-Terrorism Watch List (formally known as the Specially Designated Nationals List, available [here](#)).

### **B. Agencies Not Eligible for UWOLC Funding**

Even if they have 501(c)(3) status, the following types of organizations are ineligible for UWOLC funding:

- Highly controversial organizations
- Organizations primarily political in nature
- Organizations that benefit animals

Any organization that does not complete an Anti-Terrorism Certification or that appears on the Anti-Terrorism Watch List (Specially Designated Nationals List) is ineligible to receive UWOLC funding.

Any organization that is determined to have mismanaged funds through any relevant channel, including but not limited to the UWOLC's application and reporting processes, is ineligible to receive UWOLC funding.

### **C. Community Coalitions Eligible for UWOLC Funding**

Community coalitions in which the UWOLC serves in a leadership capacity as the lead support partner and/or fiscal agent (e.g., LOU Reads Coalition) must submit a Community Coalition Grant Application. UWOLC funds community coalitions that align with its impact areas. If UWOLC serves as the primary fiscal agent for a community coalition, a Primary Fiscal Agent Pre-Application is not required. Please note members of the UWOLC Board of Directors and UWOLC staff are not allowed to prepare a Community Coalition Grant Application.

### **Section 3. Two-Stage Proposal Process**

**Submissions must be received via email at [kurt@unitedwayoxfordms.org](mailto:kurt@unitedwayoxfordms.org) by 5:00 p.m. on the designated due dates.**

#### ***A. Primary Fiscal Agent Pre-Application***

All agencies seeking to receive UWOLC funding must submit financial and organizational documentation, which will be reviewed by the UWOLC's finance committee. The Primary Fiscal Agent Pre-Application may be submitted at any time between the announcement of the Call for Proposals and March 10, 2026. All required documents must be received by the deadline.

If UWOLC serves as the primary fiscal agent for a community coalition seeking grant funds, a Primary Fiscal Agent Pre-Application is not required.

Please note applicants planning to submit more than one Program Grant Application should only submit one Primary Fiscal Agent Pre-Application. UWOLC's finance committee will provide feedback to the community impact committee (CIC) based on the submitted documentation.

In the Primary Fiscal Agent Pre-Application, the applicant will provide basic information about the agency, assure compliance with UWOLC fiscal policies, and submit required financial and related materials in PDF form (see the Primary Fiscal Agent Pre-Application for a detailed list of the materials that are required to be submitted).

#### ***B. Program Grant Application***

Only agencies that have submitted the required Primary Fiscal Agent Pre-Application by the deadline may submit Program Grant Applications to the UWOLC. Completed Program Grant Applications must be received by April 1, 2026.

A separate Program Grant Application must be submitted for every program for which UWOLC funding is sought. The Program Grant Application includes detailed instructions on the information required.

As previously mentioned, the UWOLC is committed to measuring the impact of the funds invested in a program. For each program seeking grant funds, the applicant must complete an Outcome Measurement Plan targeted on at least two indicators. The Program Grant Application includes detailed instructions on outcome measurement and the Application Workshop described below will include guidance for applicants on this section.

#### ***C. Community Coalition Grant Application***

Community coalitions must submit the Community Coalition Grant Application to UWOLC by April 1, 2026. The Community Coalition Grant Application should be submitted to request grant funds for operating expenses and/or to maintain certification. A Program Grant Application should be submitted by a coalition if the requested grant funds will be used for ongoing programs and one-time projects. Like other applicants, a separate Program Grant Application must be submitted for every program for which UWOLC funding is sought. The Community Coalition Grant Application includes detailed instructions on the information required.

As previously mentioned, UWOLC is committed to measuring the impact of the funds invested in a community coalition. For each community coalition seeking funding, the applicant must complete an Outcome Measurement Plan targeted on at least two indicators. The Community Coalition Grant Application includes detailed instructions on outcome measurement and the Application Workshop described below will include guidance for applicants on this section.

#### ***D. Application Workshop***

Prospective applicants are encouraged to attend the FY 2026-2027 Application Workshop, which will provide guidance on how to develop a strong application and insight regarding the application review process. The workshop will be held via Zoom at 10:00 a.m. on Wednesday, February 25, 2026. Any applicants interested in participating should email UWOLC Executive Director Kurt Brummett at [kurt@unitedwayoxfordms.org](mailto:kurt@unitedwayoxfordms.org) to request the Zoom meeting information.

Although the workshop will not give applicants specific language for use in individual Program Grant Applications, it will be designed to assist in creating viable proposals.

### **Section 4. Two-Stage Review Process**

#### ***A. Evaluation of Primary Fiscal Agent Pre-Applications***

The finance committee of the UWOLC Board of Directors will review all Primary Fiscal Agent Pre-Applications. The finance committee will evaluate the submitted documentation and provide feedback to the community impact committee (CIC) to consider in making its award recommendations to the UWOLC Board of Directors. Incomplete applications may not be considered and could negatively impact award recommendations as well as grant awards.

As previously noted, if UWOLC serves as the primary fiscal agent for a community coalition, a Primary Fiscal Agent Pre-Application is not required.

#### ***B. Evaluation of Program Grant & Community Coalition Grant Applications***

In determining grant awards, the UWOLC Board of Directors will be advised by four advisory committees that match the organization's four impact areas of youth opportunity, healthy community, financial security, and community resiliency. The advisory committees will consist of UWOLC board members as well as other community volunteers who are knowledgeable about community needs, effective programming within a particular impact area, and outcome measurement.

Each advisory committee will evaluate the Program Grant Applications and Community Coalition Grant Applications submitted within its particular impact area. The committees will consider the severity of the community need being addressed as well as its alignment with UWOLC's impact areas, the anticipated strength of the program/coalition in addressing the identified need, and the anticipated strength of the program/coalition in improving community conditions so as to reduce the need in the future. The clarity and completeness of Program Grant Applications and Community Coalition Grant Applications, including the outcome measurement plan, will affect the advisory committees' evaluations.

Taking into account the advisory committees' evaluations and feedback from the finance committee, the community impact committee (CIC) of the UWOLC Board of Directors will make funding recommendations to the full board for its review and approval. Agencies will be notified of FY 2026-2027 grant awards by June 15, 2026. The Fiscal Year (FY) 2026-2027 grant cycle will run from July 1, 2026, through June 30, 2027.

### **Section 5. Post-Award Considerations**

#### ***A. Agreement of Responsibilities***

By June 30, 2026, each partner agency and community coalition receiving a grant award under the FY 2026-2027 funding cycle will be required to submit a signed Agreement of Responsibilities to the UWOLC

via email at [kurt@unitedwayoxfordms.org](mailto:kurt@unitedwayoxfordms.org). Each grant recipient will receive a copy of the Agreement of Responsibilities when the UWOLC sends out its award notifications.

### **B. *Period of Performance and Funding***

Funded programs will be conducted between July 1, 2026, and June 30, 2027.

### **C. *Quarterly Payments***

The UWOLC will issue quarterly payments to its program partner awardees in July 2026, October 2026, January 2027, and April 2027, pending receipt of required reports based upon local data. Any designations received by the UWOLC on behalf of the agency will be the first dollars awarded in the allocation process.

### **D. *Mid-Year and Year-End Reports***

Awardees must report at mid-year (by January 31, 2027) and year-end (by July 31, 2027) on beneficiaries, expenditures, and outcomes using local data. Failure to submit the required reports may result in grant funds being withheld until a report using local data is provided or the award being terminated. Awardees should notify UWOLC of any significant change in the program or agency as soon as it occurs and no later than the next report.

Previous awardees applying for FY 2026-2027 funding will also be required to report on their FY 2025-2026 beneficiaries, expenditures, and outcomes as part of the Program Grant Application and Community Coalition Grant Application submission processes.

### **E. *Fundraising Restrictions***

As outlined in detail in the Agreement of Responsibilities (see above), awardees are not allowed to solicit local employee groups at any time. Awardees are also not allowed to conduct campaigns that encourage designated contributions to the UWOLC, regardless of whether the campaigns are focused on encouraging designations to their specific organizations or in general.

## **Section 6. UWOLC FY 2026-2027 Grant Cycle Timeline**

**February 10, 2026:** Call for Proposals is distributed and announced

**February 25, 2026:** Application Workshop (Zoom, 10:00 a.m.)

**March 10, 2026:** Primary Fiscal Agent Pre-Applications are due by 5:00 p.m.

**April 1, 2026:** Program Grant and Community Coalition Grant Applications are due by 5:00 p.m.

**June 15, 2026:** Applicants are notified of award decisions on or before this date

**June 30, 2026:** Signed Agreement of Responsibilities is due from each awarded partner agency

**July 1, 2026:** UWOLC FY 2026-2027 funding period begins

**July 15, 2026:** First quarterly checks are scheduled to be mailed

**October 15, 2026:** Second quarterly checks are scheduled to be mailed

**January 15, 2027:** Third quarterly checks are scheduled to be mailed

**January 31, 2027:** Mid-Year Reports are due

**April 15, 2027:** Fourth quarterly checks are scheduled to be mailed

**June 30, 2027:** UWOLC FY 2026-2027 funding period ends

**July 31, 2027:** Year-End Reports are due

**Section 7. UWOLC Contact Information**

Please email any questions regarding the call for proposals to UWOLC Executive Director Kurt Brummett at [kurt@unitedwayoxfordms.org](mailto:kurt@unitedwayoxfordms.org).