



# 2023-2024 Grant Manual

# ABOUT IMPACT 100



Impact 100 was founded in 2001 with the goal of empowering women to ignite transformational change in their communities through collective giving.

Impact 100 is designed to award nonprofit organizations with grants in increments of at least \$100,000.

There are currently over 60 Impact 100 chapters across the United States.

To date, thousands of women have joined forces to grant more than \$123 million to nonprofit agencies throughout the world.

# ABOUT IMPACT THE PALM BEACHES

Impact the Palm Beaches was founded in 2015 with the mission of uniting women to power positive change in Palm Beach County.

Today, Impact the Palm Beaches is a philanthropic organization where women collectively give to nonprofits in Central and Northern Palm Beach County.

Through strategic grantmaking, we provide funds to organizations that reach under-served populations and highlight unmet needs in the areas of arts & culture, education, environment & animal welfare, family, and health & wellness.



# OUR FOCUS AREAS

## ARTS & CULTURE

Projects that cultivate, develop, enhance and preserve the artistic and cultural character of Palm Beach County.

## EDUCATION

Projects that further the educational process or improve access to education for children and/or adults in Palm Beach County.

## ENVIRONMENT & ANIMAL WELFARE

Projects that restore, revitalize or enhance the environment and/or promote the protection and welfare of animals in Palm Beach County.

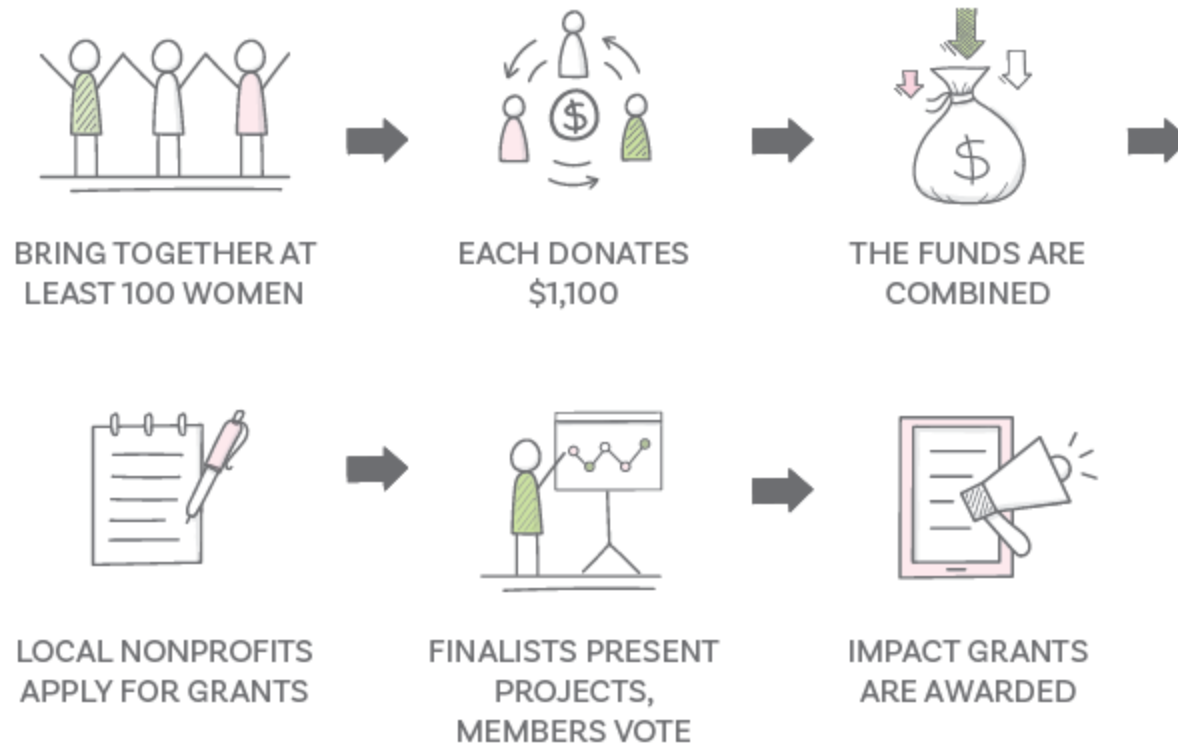
## FAMILY

Projects that strengthen and enhance the lives of children and families living in Palm Beach County.

## HEALTH & WELLNESS

Projects that improve the mental and/or physical well-being of people living in Palm Beach County.

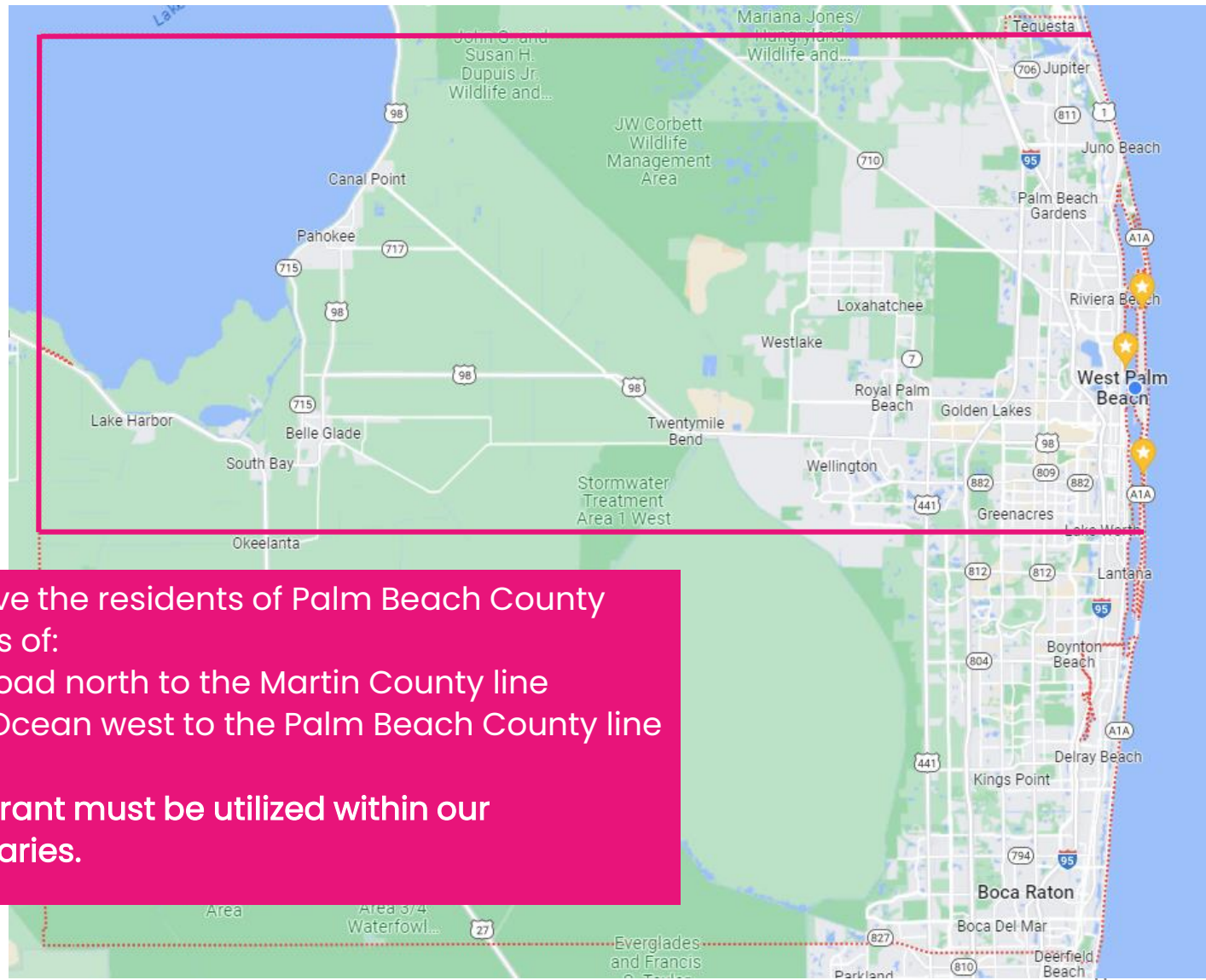
# IMPACT MODEL



For every 100 members, we are able to invest \$100,000 directly into improving our community. The exact amount of funds available to award in any given year depends on the number of women who join the organization each year.

Since our founding in 2015, Impact the Palm Beaches has invested \$1.5 million in our community.

# GRANT BOUNDARIES



The project must serve the residents of Palm Beach County within the boundaries of:

- Lake Worth Road north to the Martin County line
- The Atlantic Ocean west to the Palm Beach County line

The entire \$100,000 grant must be utilized within our geographical boundaries.

# ELIGIBILITY REQUIREMENTS

- The applicant must be a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code and designated as such for at least 19 months.
- The organization must be able to provide the following documents:
  - IRS Form 990
  - Financial statements audited by an independent accountant or accounting firm (a financial review or compilation prepared by a Certified Public Accountant will also be accepted)
  - IRS 501(c)(3) Determination Letter
  - Florida Department of Agriculture Solicitation Permit
- Recipients of an Impact the Palm Beaches \$100,000 grant are not eligible to receive a grant for at least 4 years from the date the grant was awarded. Organizations chosen as grant recipients in April 2023 are not eligible to receive a grant until April 2027. Merit award winners may reapply the following year. Recipients of a \$100,000 grant cannot receive new grant funds through paid collaborations within the 4-year time period.
- The program may be new, an expansion of an existing program, or a collaborative effort between more than one qualifying agency.
- The organization must use the full amount of the grant within two years of the award date.

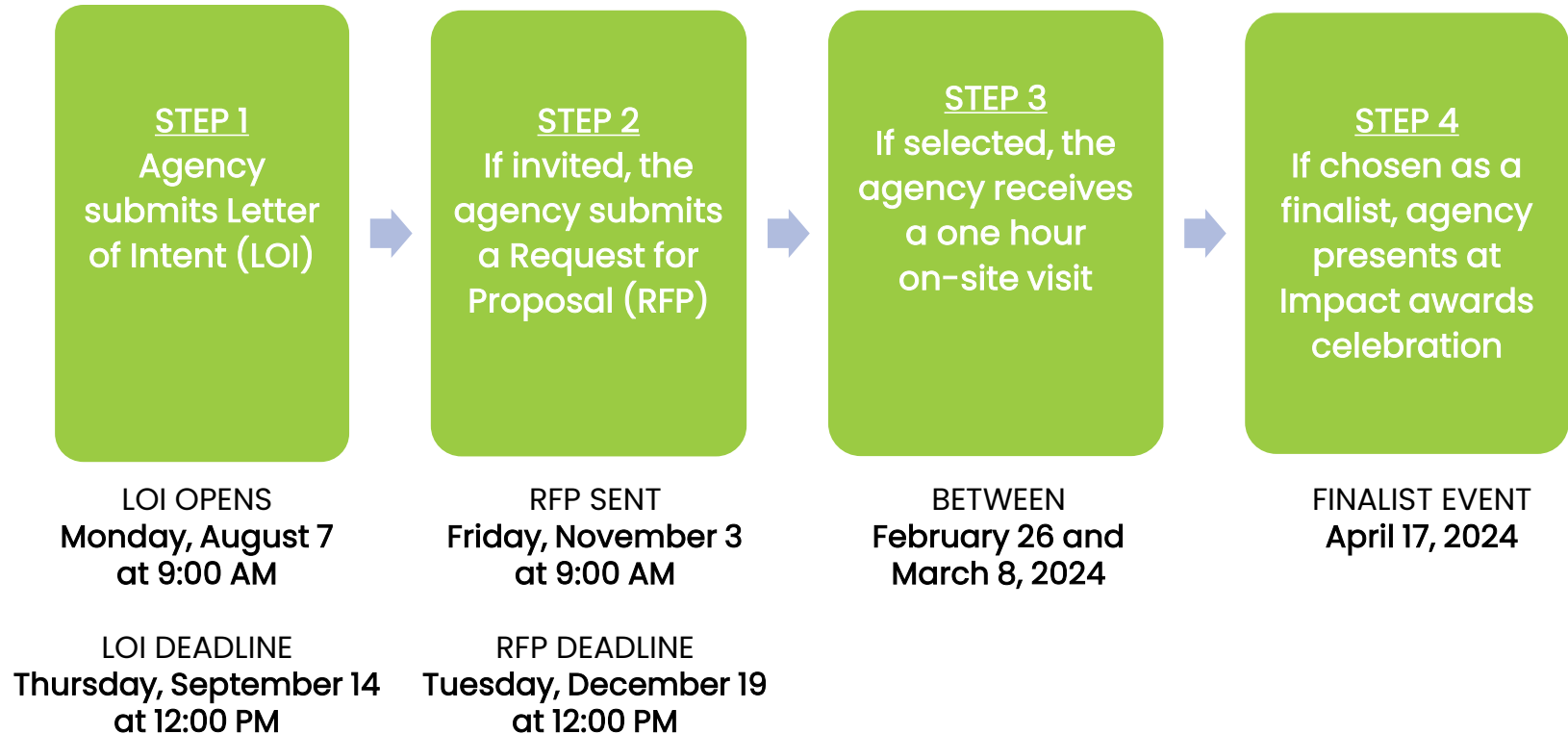
# WHAT WE DO NOT ACCEPT

- Activities outside our 5 focus areas of Arts & Culture, Education, Environments & Animal Welfare, Family, and Health & Wellness
- Programs that take place outside of our geographic area
- Debt reduction or operational deficits
- Fundraising campaigns or events
- Capital campaigns (\*definition below)
- Endowments or memorials
- Bridge funding or interim financing
- Partisan or political activities
- Legal expenses
- Travel expenses
- Loans
- Grants to individuals
- Grants to private foundations
- Religious organizations for religious purposes

\***CAPITAL CAMPAIGN:** A capital campaign is an organized drive to collect and accumulate **SUBSTANTIAL** funds to finance major needs of an organization such as a building or major repair or remodeling project. Capital campaigns are different than requests for capital grants to fund specific equipment, building costs, vehicles or materials that are clearly wrapped around a program or a project serving clients of the organization. Impact the Palm Beaches **WILL** permit grant requests for capital projects.



# GRANT PROCESS



# GRANT REVIEW

Impact the Palm Beaches Grant Committee members are responsible for carefully vetting grant applications and selecting finalists who will present at the Annual Impact Award Celebration. Committee members serve as the eyes and ears of the entire membership.

Committee members extensively review and score grant proposals, attend agency site visits, and meet to vote on which proposals to move forward. At the Awards Celebration, ALL members of Impact the Palm Beaches vote and winning programs are selected by majority vote.

The Grant Committee is made up of about 30 members of Impact the Palm Beaches. Members have diverse backgrounds, professional skills, work histories, and nonprofit experience.

Training is provided to members, including how to review financial data and IRS 990s.

These are volunteer positions.

# WHAT WE LOOK FOR

We seek to fund programs that:

- Reach underserved populations and address or satisfy unmet needs
- Solve a problem or create an opportunity for strategic change
- Create long-term positive impact
- Are well-defined, studied and deliberate
- Can demonstrate specific, measurable outcomes
- Are sustainable well into the future

## 2022-2023 Impact Awardees

### Alzheimer's Community Care | \$100,000 | Fostering Independence

Funds are being used to purchase an application that helps those with early-stage Alzheimer's disease to organize their habits and routines into visual maps, and to pay a portion of the salary of a Family Nurse Navigator to assist families with the application.

### Center for Child Counseling | \$100,000 | Keeping Kids Safe

Funds are being used to provide an age-appropriate and interactive curriculum to 12 elementary schools that simplifies the sensitive topic of child sexual abuse and trafficking prevention. Funds cover salaries, program materials, and a multimedia campaign.

### Wounded Veterans Relief Fund | \$100,000 | Emergency Dental Care for Disabled Veterans

100% of funds are being used to provide emergency/essential dental care to disabled veterans who do not qualify for VA dental coverage.

### Families First | \$77,000 | Infant Mental Health

Funds are being used to cover staff salaries for clinicians to observe Head Start classrooms at Title 1 schools and work with teachers and parents to develop treatment plans.

# PAST RECIPIENTS

## 100,000 GRANT RECIPIENTS

2021

**Feed the Hungry Pantry:** Refrigeration Containers

**Vita Nova:** Transport for Success

2020

**Clinics Can Help:** Mobile Unit

**West Jupiter Community Center:** Community Garden

2019

**Center for Trauma Counseling:** Mobile Clinic

2018

**Center for Child Counseling:**

School Counselors

2017

**Project LIFT:** Belle Glade Expansion

2016

**Palm Beach Dramaworks:** One Humanity Tour

2015

**Live Fresh:** Mobile Showers

## MERIT GRANT RECIPIENTS

2021

**Literacy Coalition:** Building Better Readers (\$16,500)

**Project LIFT:** Pathway Academy (\$16,500)

2020

**Loggerhead Center:** Healthier Waters (\$8,050)

**Florida Atlantic University:** Mobile Minds (\$8,050)

2019

**The Lord's Place:** #NextGen (\$29,500)

**Habitat for Humanity:** Aging in Place (\$29,500)

2018

**Community Partners:** Community Center (\$24,000)

**Meals on Wheels:** Kitchen supplies (\$24,000)

2017

**Pediatric Oncology Support:** Virtual Reality (\$27,000)

2016

**Memory Trees:** Gramercy Park Revitalization (\$11,500)

**The Lord's Place:** Transforming Lives (\$11,500)

2015

**Take Stock in Children:** College Retention (\$8,500)

**Legal Aid Society:** Educational Advocacy (\$8,500)

# LETTER OF INTENT

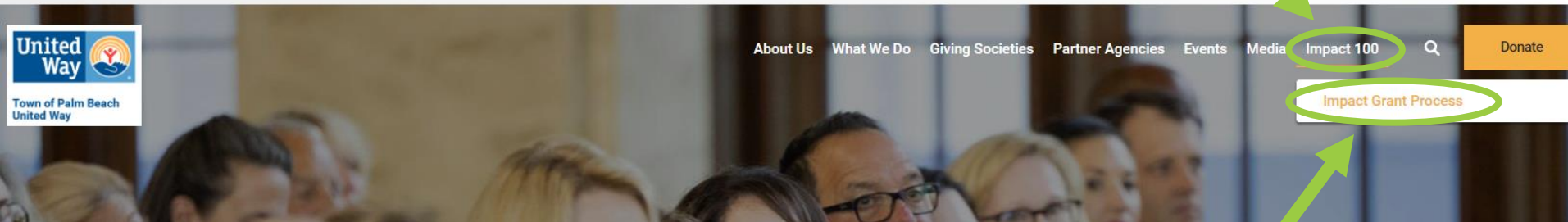
Opens Monday, August 7, 2023 at 9:00 AM  
Closes Thursday, September 14, 2023 at 12:00 PM

The Letter of Intent (LOI) will be available through the Town of Palm Beach United Way website [www.palmbeachunitedway.org/impact-grant-process](http://www.palmbeachunitedway.org/impact-grant-process). Bookmark this page for direct access once the process opens.

The Letter of Intent will not be available until **Monday, August 7 at 9:00 AM.**

Please note, this is **not** a Town of Palm Beach United grant. The Town of Palm Beach United Way is the fiscal agent for Impact the Palm Beaches.

[Dream Academy](#) [Ukraine](#) [Hurricane Ian](#) [COVID](#) [Board Login](#)



# LETTER OF INTENT

Opens Monday, August 7, 2023 at 9:00 AM  
Closes Thursday, September 14, 2023 at 12:00 PM

Once on the Town of Palm Beach United Way website you will be able to click and download the Letter of Intent.

You will have the option of downloading a [PROGRAM](#) application or a [CAPITAL PROJECT](#) application.

**CAPITAL PROJECT GRANT:** A grant that is used for equipment, building costs, vehicles or materials.

**PROGRAM GRANT:** A grant this is used to fund a particular program usually including salaries or personnel related costs.

1. Program and Capital projects will be reviewed and scored by the Grant Committee
2. The Letter of Intent is in Microsoft Word and should be submitted as a Word document. The signature page and all other required documents should be submitted as PDFs. **Specified word counts should be adhered to. Text that goes over the word limit will be manually deleted.**
3. Detailed instructions on how to submit the Letter of Intent and accompanying documents can be found on the form.
4. **Your application is only considered accepted when you are sent an email confirmation specifying so.**

# LETTER OF INTENT

Opens Monday, August 7, 2023 at 9:00 AM  
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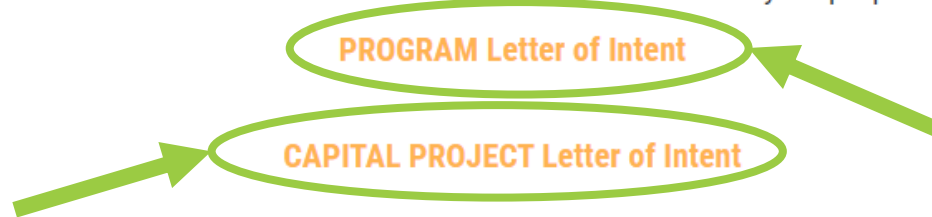
## Letter of Intent



Thank you for your interest in applying for a grant from Impact the Palm Beaches. Completing the Letter of Intent is the first step in our process. You will be asked to provide specifics on the proposed program, including who it serves and why it is needed. You will also be asked to submit financial information and a proposed budget.

The Letter of Intent deadline is **Thursday, September 14, 2023 at 12:00 PM.**

Click below to download the Letter of Intent that fits your proposal.



### QUESTIONS?

Contact Grant Chair Aleese Kopf at 561-655-1919 or [aleesekopf@palmbeachunitedway.org](mailto:aleesekopf@palmbeachunitedway.org).

How To Submit



Steps To Submit



Grant Eligibility Requirements



# LETTER OF INTENT (Program)

Opens Monday, August 7, 2023 at 9:00 AM  
Closes Thursday, September 14, 2023 at 12:00 PM

## 1. AGENCY INFORMATION

Agency Name:  
Mailing Address:  
Website:

## 2. AGENCY CONTACT

Name:  
Position/Title:  
Phone:  
Email:

## 3. AGENCY PROFILE (150 words max)

*Please provide a brief summary of the agency's history and a statement of the agency's mission and vision.*

## 4. PROGRAM NAME

*Please provide a name for the program.*

## 5. IMPACT FOCUS AREA

*Please select which focus area the program falls under: Arts & Culture, Education, Environment & Animal Welfare, Family, or Health & Wellness*

## 6. PROGRAM SERVICE AREA

*Please list the address(es) of where services for this program will take place. Please keep in mind the program must serve the residents of Palm Beach County within the boundaries of Lake Worth Road north to the Martin County line and from the Atlantic Ocean west to the Palm Beach County line.*

## 7. PROGRAM DESCRIPTION (450 words max)

*Please describe the program and how it will be executed. Please specify if the program is new or existing.*



# LETTER OF INTENT (Program)

Opens Monday, August 7, 2023 at 9:00 AM  
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## **8. COMMUNITY NEED** (250 words max)

*What community need in Palm Beach County does this program address? How does the proposed program meet this need? Why is the program important and necessary?*

## **9. TARGET POPULATION** (200 words max)

*Who is served by the program? What are the demographics of program participants? Please list the total number of individuals the program serves or will serve. Are these new or existing clients? How will program participants be chosen?*

## **10. OUTCOMES** (250 words max)

*How will you measure the success of this program? What tangible outcomes do you hope to achieve? What tools will you use to measure and track program outcomes? How will the program improve lives and create impactful change in our community?*

## **11. \*SUSTAINABILITY** (200 words max)

*Impact grant funds must be used within 24 months of the award date. Please demonstrate how the program will continue to be funded after that time, including salaries and operating costs.*

*\*Sustainability definition: the program supports the agency's mission and strategic plan. The agency's board and executive leadership provide effective operational and fiscal leadership. The members of the board support the work of the agency financially. The agency is financially stable and conducting effective annual fundraising. The staffing for the program/project is realistic. The agency can demonstrate how they will secure future funding for the program/project.*

# LETTER OF INTENT (Program)

## PRELIMINARY BUDGET

### 12. PRELIMINARY PROGRAM BUDGET

Submit the proposed income and expenses for the program demonstrating how the Impact grant will be used. List the expenses for the program in Column 2 and what dollar amount will be covered by the Impact grant in Column 3. Please add additional lines if necessary. If the program serves the community beyond the boundaries of Impact, please prorate Total Program Expenses to **ONLY** include those incurred within the Impact grant boundaries. **The Total Program Expense should equal the Total Program Income.**

EXPENSE DESCRIPTION	TOTAL PROGRAM EXPENSE	IMPACT EXPENSE	TOTAL PROGRAM INCOME	
Salary and Wages			IMPACT THE PALM BEACHES	<b>\$100,000</b>
Employee Benefits			Government Grants	
Payroll Taxes			United Way	
Insurance			Foundations	
Consultants/Professional Fees			Corporate Grants	
Employee Transportation			Individual Contributions	
Client Transportation			Fundraising Events	
Equipment/Technology			Other (Please Specify) *	
Training and Staff Development			Other (Please Specify) *	
Conferences/Meetings			<b>TOTAL PROGRAM INCOME</b>	
Program Supplies			*Add more lines if necessary	
Printing/Copying/Publications				
Utilities/Telephone				
Lease/Mortgage				
Repair/Maintenance				
Other (Be Specific) *				
Other (Please Specify) *				
<b>TOTAL PROGRAM EXPENSE</b>		<b>\$100,000</b>		

# LETTER OF INTENT (Capital Project)

Opens Monday, August 7, 2023 at 9:00 AM  
Closes Thursday, September 14, 2023 at 12:00 PM

## 1. AGENCY INFORMATION

Agency Name:  
Mailing Address:  
Website:

## 2. AGENCY CONTACT

Name:  
Position/Title:  
Phone:  
Email:

## 3. AGENCY PROFILE (150 words max)

*Please provide a brief summary of the agency's history and a statement of the agency's mission and vision.*

## 4. CAPITAL PROJECT NAME

*Please provide a name for the capital project.*

## 5. IMPACT FOCUS AREA

*Please select which focus area the capital project falls under: Arts & Culture, Education, Environment & Animal Welfare, Family, or Health & Wellness*

## 6. CAPITAL PROJECT SERVICE AREA

*Please list the address(es) of where services associated with this project will take place. Please keep in mind the project must serve the residents of Palm Beach County within the boundaries of Lake Worth Road north to the Martin County line and from the Atlantic Ocean west to the Palm Beach County line.*

## 7. CAPITAL PROJECT DESCRIPTION (150 words max)

*Please describe what type of capital project this is, for example, construction, re-construction, renovation, vehicular, equipment purchase, etc. Please explain how the capital project will be executed and include a project management timeline with start and finish dates, if applicable.*

# LETTER OF INTENT (Capital Project)

Opens Monday, August 7, 2023 at 9:00 AM  
Closes Thursday, September 14, 2023 at 12:00 PM

## **8. CAPITAL PROJECT PROGRAMMING** (200 words max)

*What program of the agency does this capital project relate to? How does the capital project enhance the program? How does it benefit the clients being served?*

## **9. COMMUNITY NEED** (250 words max)

*What community need in Palm Beach County does this capital project address? How does the proposed capital project meet this need? Why is the capital project important and necessary?*

## **10. TARGET POPULATION** (200 words max)

*Who is served by the capital project? What are the demographics of clients who will be served through the capital project? Please list the total number of individuals the capital project serves or will serve. Are these new or existing clients? How will participants be chosen?*

## **11. OUTCOMES** (250 words max)

*How will you measure the success of this capital project, including how it relates to programming? What tangible outcomes do you hope to achieve through the capital project? What tools will you use to measure and track outcomes? How will the project improve lives and create impactful change in our community?*

# LETTER OF INTENT (Capital Project)

## PRELIMINARY BUDGET

### 12. PRELIMINARY CAPITAL PROJECT BUDGET

Submit the proposed income and expenses for the capital project demonstrating how the Impact grant will be used. List the expenses for the project in Column 2 and what dollar amount will be covered by the Impact grant in Column 3. Please add additional lines if necessary. If the project serves the community beyond the boundaries of Impact, please prorate Total Project Expenses to **ONLY** include those incurred within the Impact grant boundaries. **The Total Project Expense should equal the Total Project Income.**

EXPENSE DESCRIPTION	TOTAL PROJECT EXPENSE	IMPACT EXPENSE
Salary and Wages		
Employee Benefits		
Payroll Taxes		
Insurance		
Consultants/Professional Fees		
Permitting/Zoning Fees		
Equipment Purchase		
Technology		
Construction/Re-construction Costs		
Renovation Costs		
Land/Property Acquisition		
Transportation		
Lease/Mortgage		
Repair/Maintenance		
Other (Be Specific) *		
Other (Be Specific) *		
Other (Please Specify) *		
<b>TOTAL PROJECT EXPENSE</b>		<b>\$100,000</b>

	TOTAL PROJECT INCOME
IMPACT THE PALM BEACHES	<b>\$100,000</b>
Government Grants	
United Way	
Foundations	
Corporate Grants	
Individual Contributions	
Fundraising Events	
Other (Please Specify) *	
Other (Please Specify) *	
<b>TOTAL PROJECT INCOME</b>	

\*Add more lines if necessary

# LETTER OF INTENT

## SIGNATURE AUTHORIZATION

### **SIGNATURE AUTHORIZATION**

*Please obtain signatures signifying the Letter of Intent form has been reviewed and approved by the agency's Chief Executive Officer and Chairman of the Board.*

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Print Chief Executive Officer

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Signature Chief Executive Officer

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Date

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Print Chairman of the Board

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Signature Chairman of the Board

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Date

# LETTER OF INTENT

## REQUIRED ATTACHMENTS

### REQUIRED ATTACHMENTS

*Email the following documents together with the Letter of Intent to Grant Chair*

*Aleese Kopf at [aleesekopf@palmbeachunitedway.org](mailto:aleesekopf@palmbeachunitedway.org).*

1. IRS 501(c)(3) Determination Letter (PDF)
2. Florida Department of Agriculture Solicitation Permit (exceptions made for exemptions) (PDF)
3. IRS 990 (PDF)
4. Audited Financial Statements (a financial review or compilation prepared by a Certified Public Accountant will also be accepted) (PDF)
5. Audit Management Letter (if applicable) (PDF)
6. Board Roster with names, board positions, years of service and professional affiliations (PDF)

**EXAMPLES OF THE REQUIRED DOCUMENTS ARE PROVIDED ON PAGES 25 THROUGH 30.**

# LETTER OF INTENT EXAMPLE

REQUIRED ATTACHMENT: 501(c)(3) DETERMINATION LETTER

**Internal Revenue Service**  
P.O. Box 2508  
Cincinnati, OH 45201

**Department of the Treasury**

**Date:** April 6, 2006

**Person to Contact:**

Tracy Garrigus #31-07307

**Toll Free Telephone Number:**

877-829-5500

**Employer Identification Number:**

59-0637885

TOWN OF PALM BEACH UNITED WAY INC  
44 COCOANUT ROW M201  
PALM BEACH FL 33480-4069

Dear Sir or Madam:

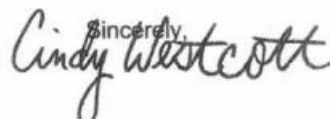
This is in response to the amendment to your organization's Articles of Incorporation filed with the state on December 14, 2005. We have updated our records to reflect the name change as indicated above.

Our records indicate that a determination letter was issued in February 1949 that recognized you as exempt from Federal income tax. Our records further indicate that you are currently exempt under section 501(c)(3) of the Internal Revenue Code.

Our records also indicate you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely,  


Cindy Westcott  
Manager, Exempt Organizations  
Determinations



# LETTER OF INTENT EXAMPLE

REQUIRED ATTACHMENT: FLORIDA DEPARTMENT OF AGRICULTURE SOLICITATION PERMIT  
[www.fdacs.gov/Business-Services/Solicitation-of-Contributions](http://www.fdacs.gov/Business-Services/Solicitation-of-Contributions)

DIVISION OF CONSUMER SERVICES  
(850) 410-3800



THE RHODES BUILDING  
2005 APALACHEE PARKWAY  
TALLAHASSEE, FLORIDA 32399-6500

FLORIDA DEPARTMENT OF AGRICULTURE AND CONSUMER SERVICES  
COMMISSIONER NICOLE "NIKKI" FRIED

June 17, 2021

Refer To: CH368

TOWN OF PALM BEACH UNITED WAY, INC.  
44 COCOANUT ROW # M-201  
PALM BEACH, FL 33480-4069

RE: TOWN OF PALM BEACH UNITED WAY, INC.  
REGISTRATION#: CH368  
EXPIRATION DATE: September 12, 2022

Dear Sir or Madam:

The above-named organization/sponsor has complied with the registration requirements of Chapter 496, Florida Statutes, the Solicitation of Contributions Act. A COPY OF THIS LETTER SHOULD BE RETAINED FOR YOUR RECORDS.

Every charitable organization or sponsor which is required to register under s. 496.405 must conspicuously display the registration number issued by the Department and in capital letters the following statement on every printed solicitation, written confirmation, receipt, or reminder of a contribution:

"A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE (800-435-7352) WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE."

The Solicitation of Contributions Act requires an annual renewal statement to be filed on or before the date of expiration of the previous registration. The Department will send a renewal package approximately 30 days prior to the date of expiration as shown above.

Thank you for your cooperation. If we may be of further assistance, please contact the Solicitation of Contributions section.

Sincerely,

Kayla Creech  
Regulatory Consultant  
850-410-3769  
Fax: 850-410-3804  
E-mail: [kayla.creech@fdacs.gov](mailto:kayla.creech@fdacs.gov)

# LETTER OF INTENT EXAMPLE

REQUIRED ATTACHMENT: IRS FORM 990

Form **990** **Return of Organization Exempt From Income Tax** OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

**2020**  
Open to Public Inspection

**A** For the 2020 calendar year, or tax year beginning July 1, 2020, and ending June 30, 2021

**B** Check if applicable:  
 Address change  
 Name change  
 Initial return  
 Final return/terminated  
 Amended return  
 Application pending

**C** Name of organization **Town of Palm Beach United Way, Inc.**  
 Doing business as  
 Number and street (or P.O. box if mail is not delivered to street address) Room/suite  
**44 Coconut Row M-201**  
 City or town, state or province, country, and ZIP or foreign postal code  
**Palm Beach, FL 33480**

**D** Employer identification number  
**59-0637885**

**E** Telephone number  
**561-655-1919**

**G** Gross receipts \$ **5,699,794**

**F** Name and address of principal officer: **Elizabeth Walton**  
**PO Box 1141, Palm Beach, FL 33480**

**H(a)** Is this a group return for subsidiaries?  Yes  No  
**H(b)** Are all subsidiaries included?  Yes  No  
 If "No," attach a list. See instructions

**I** Tax-exempt status:  501(c)(3)  501(c) ( ) (insert no.)  4947(a)(1) or  527

**J** Website: ▶ [www.palmbeachunitedway.org](http://www.palmbeachunitedway.org)

**K** Form of organization:  Corporation  Trust  Association  Other ▶

**L** Year of formation: **1945**

**M** State of legal domicile: **FL**

**Part I Summary**

		Prior Year	Current Year
Activities & Governance	<b>1</b> Briefly describe the organization's mission or most significant activities: <u>The Town of Palm Beach United Way is committed to building a healthy community by helping people care for one another, and investing in programs that build a better life for all by focusing on improving education, income and health.</u>		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.		
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a)	<b>3</b>	<b>75</b>
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b)	<b>4</b>	<b>75</b>
	<b>5</b> Total number of individuals employed in calendar year 2020 (Part V, line 2a)	<b>5</b>	<b>6</b>
	<b>6</b> Total number of volunteers (estimate if necessary)	<b>6</b>	<b>440</b>
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12	<b>7a</b>	<b>0</b>
<b>b</b> Net unrelated business taxable income from Form 990-T, Part I, line 11	<b>7b</b>	<b>0</b>	
Revenue	<b>8</b> Contributions and grants (Part VIII, line 1h)	<b>6,476,090</b>	<b>5,462,980</b>
	<b>9</b> Program service revenue (Part VIII, line 2g)		
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7c)	<b>84,522</b>	<b>136,906</b>
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<b>173,604</b>	<b>99,908</b>
	<b>12</b> Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<b>6,734,216</b>	<b>5,699,794</b>
	Expenses	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1–3)	<b>4,837,862</b>
<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4)			
<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)		<b>497,912</b>	<b>472,652</b>
<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e)			
<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶		<b>361,787</b>	
<b>17</b> Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)		<b>400,527</b>	<b>666,406</b>
<b>18</b> Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	<b>5,736,301</b>	<b>5,599,556</b>	
<b>19</b> Revenue less expenses. Subtract line 18 from line 12	<b>997,915</b>	<b>100,238</b>	
Net Assets or Fund Balances	<b>20</b> Total assets (Part X, line 16)	<b>15,414,116</b>	<b>17,611,590</b>
	<b>21</b> Total liabilities (Part X, line 26)	<b>3,426,263</b>	<b>3,593,946</b>
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20	<b>11,987,853</b>	<b>14,017,644</b>

# LETTER OF INTENT EXAMPLE

## REQUIRED ATTACHMENT: AUDITED FINANCIAL STATEMENTS

### Audited Financial Statements and Supplementary Information

### Town of Palm Beach United Way, Inc.

June 30, 2021

#### TOWN OF PALM BEACH UNITED WAY, INC.

#### STATEMENT OF FINANCIAL POSITION

June 30, 2021 (with Comparative Totals for June 30, 2020)

	<u>2021</u>	<u>2020</u>
<b>ASSETS</b>		
<b>CURRENT ASSETS</b>		
Cash	\$ 5,191,459	\$ 5,367,035
Pledges receivable	197,266	200,742
Prepaid expenses	2,162	200
<b>TOTAL CURRENT ASSETS</b>	<u>5,390,887</u>	<u>5,567,977</u>
PROPERTY AND EQUIPMENT, net	28,527	17,160
<b>OTHER ASSETS</b>		
Beneficial interests in trusts	2,587,410	2,184,693
Cash - endowment	7,102	4,679,159
Investments - endowment	9,597,664	2,965,127
	<u>12,192,176</u>	<u>9,828,979</u>
<b>TOTAL ASSETS</b>	<u>\$ 17,611,590</u>	<u>\$ 15,414,116</u>
<b>LIABILITIES AND NET ASSETS</b>		
<b>CURRENT LIABILITIES</b>		
Accounts payable and accrued expenses	\$ 18,096	\$ 13,349
Allocations to agencies	3,575,850	3,333,620
Current portion of note payable	-	39,335
<b>TOTAL CURRENT LIABILITIES</b>	<u>3,593,946</u>	<u>3,386,304</u>
NOTE PAYABLE, net of current portion	-	39,959
<b>TOTAL LIABILITIES</b>	<u>3,593,946</u>	<u>3,426,263</u>
<b>NET ASSETS</b>		
Without donor restrictions	7,536,543	6,146,389
With donor restrictions	6,481,101	5,841,464
<b>TOTAL NET ASSETS</b>	<u>14,017,644</u>	<u>11,987,853</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<u>\$ 17,611,590</u>	<u>\$ 15,414,116</u>

# LETTER OF INTENT EXAMPLE

## AUDIT MANAGEMENT LETTER (if applicable)



CALER, DONTEN, LEVINE,  
COHEN, PORTER & VEIL, P.A.

MEMBER  
AMERICAN INSTITUTE OF  
CERTIFIED PUBLIC ACCOUNTANTS

CERTIFIED PUBLIC ACCOUNTANTS

505 SOUTH FLAGLER DRIVE, SUITE 900  
WEST PALM BEACH, FL 33401-5948  
TELEPHONE: (561) 832-9292

MEMBER  
FLORIDA INSTITUTE OF  
CERTIFIED PUBLIC ACCOUNTANTS

799 SW FEDERAL HIGHWAY, SUITE 301  
STUART, FL 34994-1019  
TELEPHONE: (772) 872-2123

### Management Letter

To the Board of Trustees  
and Audit Committee  
Town of Palm Beach United Way, Inc.  
Palm Beach, Florida

In planning and performing our audit of the financial statements of the Town of Palm Beach United Way, Inc. (the "Organization") as of and for the year ended June 30, 2021, in accordance with U.S. generally accepted auditing standards, we considered the Organization's internal control over financial reporting (internal control) as a basis for designing auditing procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies in internal control, such that there is a reasonable possibility that a material misstatement of the entity's financial statements will not be prevented, or detected and corrected, on a timely basis.

Our consideration of internal control was for the limited purpose described in the first paragraph and was not designed to identify all deficiencies in internal control that might be material weaknesses. Given these limitations, during our audit, we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

This communication is intended solely for the information and use of the Board of Trustees, Audit Committee, and management of the Town of Palm Beach United Way, Inc. and is not intended to be, and should not be, used by anyone other than these specified parties.

*Caler, Donten, Levine,*

# LETTER OF INTENT EXAMPLE

REQUIRED ATTACHMENT: BOARD ROSTER  
INCLUDE NAME, POSITION, YEARS OF SERVICE AND AFFILIATIONS

## TOWN OF PALM BEACH UNITED WAY 2021-2022 BOARD OF TRUSTEES

Mrs. Missy Agnello  
Board Treasurer  
8 years of service  
Affiliations: CPA

Mrs. Suzanne Ainslie  
2 years of service  
Affiliations: Sotheby's International Realty

Mrs. Ann-Britt Angle  
5 years of service  
Affiliations: Christian Angle Real Estate

Mr. Sean Baker  
4 years of service  
Affiliations: Town of Palm Beach Fire-Rescue

Mr. Howard Bernick  
5 years of service  
Affiliations: Bernick Advisory Limited

Mrs. Paula Butler  
3 years of service  
Affiliations: Philanthropist

Mr. Jorge Cabrera  
Board Deputy Treasurer  
8 years of service  
Affiliations: Breakers Palm Beach

Mr. Atesh Chandra  
7 years of service  
Affiliations: Breakers Palm Beach

Mrs. Gail Coniglio  
Board Executive Committee  
6 years of service  
Affiliations: E.R. Bradley's Saloon

Mr. Mark Cook  
Board Vice Chairman  
8 years of service  
Affiliations: Royal Palm Management

# LETTER OF INTENT

## STEPS TO SUBMIT

### STEPS TO SUBMIT

1. Complete the Letter of Intent.

2. Email the Letter of Intent and required documents to Grant Committee Chair Aleese Kopf at [aleesekopf@palmbeachunitedway.org](mailto:aleesekopf@palmbeachunitedway.org) by the deadline **Thursday, September 14 at 12:00 PM.**

Please submit all required documents in one email. As stated on the LOI, the LOI should be submitted as a Word document with the required attachments in PDF form.

Letter of Intent proposals received past the deadline will not be accepted. **No exceptions.** **Submit early** to allow yourself enough time to make any corrections if necessary.

Grant Committee Chair Aleese Kopf will reply to your email with a message that your Letter of Intent and supporting documents have a) been received and accepted, or b) received but require changes. Your Letter of Intent **is not considered accepted** until you receive an email specifying so.

# LETTER OF INTENT

## REVIEW PROCESS

The Impact Grant Committee will review and score each LOI. The review and scoring period is from **Thursday, September 28, 2023** to **Friday, October 27, 2023**.

After reviewing the LOI's, the grant committee will invite a select number of agencies to submit a Request for Proposal (RFP).

The RFP will be emailed to those agencies selected on **Friday, November 3, 2023**. Agencies will have until **Tuesday, December 19, 2023** to submit the full RFP application.

Agencies not selected to advance to the RFP stage will also be notified via email.



## QUESTIONS?

Contact Grant Committee Chair  
Aleese Kopf at  
[aleesekopf@palmbeachunitedway.org](mailto:aleesekopf@palmbeachunitedway.org)  
or 561-655-1919

# THANK YOU!