

A. Organization Information

Case Id: 30115

Name: Los Angeles Wealth and Opportunity Institute -

Address: 19403 Nestor Avenue, Carson, CA 90746--9998

A. Organization Information

Please provide the following information.

A.1. Applicant/Organization Name:

Los Angeles Wealth & Opportunity Institute (LAWOI)

A.2. Executive Director:

Ronald Keith Williams Jr.

A.3. Phone:

3102915908

A.4. Email:

ronald@lawoi.org

A.5. Funding Request:

\$65,000.00

A.6. Address:

19403 Nestor Avenue Carson, CA 90746--9998

A.7. Mailing Address (if different from Business address):

A.8. Tax ID#

[REDACTED]

A.9. DUNS#:

[REDACTED]

PROJECT/PROGRAM

A.10. Project/Program Name:

Orange Empowerment Initiative

A.11. Project/Program Address:

501 S. Lemon St Orange, CA 92868

A.12. Additional project address locations?

Yes

A.13. Project/Program Manager:

Thomas Andrews

A.14. Project/Program Manager Phone:

(310) 538-9466

A.15. Project/Program Manager Email:

thomas@lawoi.org

FISCAL MANAGER

A.16. Fiscal Manager:

Jared Grimes

A.17. Fiscal Manager Phone:

(562) 809-2207

A.18. Fiscal Manager Email:

jared.grimes@lawoi.org

GRANT CONTACT

A.19. Grant Application Contact:

Ronald Keith Williams Jr.

A.20. Grant Contact Phone:

(310) 291-5908

A.21. Grant Contact Email:

ronald@lawoi.org

AUTHORIZED SIGNERS ON AGREEMENT

A.22. Name:

Ronald Keith Williams Jr.

A.23. Title:

Executive Director

A.24. Email:

ronald@lawoi.org

If secondary signer:

A.25. Name:

A.26. Title:

A.27. Email:

QUARTERLY AND ANNUAL REPORTING CONTACT

A.28. Name:

Jared Grimes

A.29. Title:

Treasurer

A.30. Email:

jared.grimes@lawoi.org

B. Description

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B. Description

Please provide the following information.

ORGANIZATION DESCRIPTION

B.1. Provide a brief general description of your organization's goals and/or mission statement:

The Los Angeles Wealth & Opportunity Institute (LAWOI) is a 501(c)(3) nonprofit organization dedicated to empowering underserved communities through workforce readiness, financial literacy, and support services; and building wealth and bridging opportunity.

PROJECT/PROGRAM DESCRIPTION and PURPOSE

B.2. Provide a description of the specific project or program being proposed, clearly stating what the project intends to provide or accomplish, and the specific activities for which funds will be used.

B.2. Provide a description of the specific project or program being proposed, clearly stating what the project intends to provide or accomplish, and the specific activities for which funds will be used. LAWOI proposes the "Orange Empowerment Initiative," a 12-month workforce training and financial literacy program for 125 low- and moderate-income Orange residents. The program intends to provide free, comprehensive training to reduce unemployment, enhance financial stability, and prevent homelessness by equipping participants with skills for living-wage jobs (\$25+/hr) and tools for affordable housing (e.g., budgeting, credit repair). It will accomplish: 80% participant certification in trades/energy sectors; 70% placement in stable employment; and pathways to housing security, aligning with the City of Orange's 2025-2029 Consolidated Plan goals of addressing homelessness (through prevention and stability) and community development (public services for low-income populations, including special needs groups like homeless households, reentry individuals, youth 18-24, seniors 55+, single parents, and farmworkers via partners). Specific activities include: 5 cohorts of 25 participants each in a 12-week model, delivered via mobile units and partner sites (e.g., Friendly Center and Families Forward); workforce readiness (resume building, job search, entry-level certifications in trades/energy); financial literacy (budgeting, credit management, housing affordability); and mental health support. Funds will be used for: wages/salaries (\$30,000 for facilitators/staff); personnel benefits (\$6,000); materials/supplies (\$15,000 for training resources/certification fees); direct program expenses (\$16,000 for cohort sessions/mental health tools); mileage (\$6,000 for mobile delivery/transportation stipends); and other stipends/certifications (\$7,000 for participant incentives). This leverages partnerships with Friendly Center (family services), Families Forward (housing/homeless support), and Orange County United Way (financial/workforce pipelines) for cohesive service delivery.

C. Objective

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C. Objective

Please provide the following information.

NATIONAL OBJECTIVE

C.1. Check the National Objective Subcategory that your project meets the national objective of **Benefiting Low- and Moderate Income (LMI) Persons**:

National Objective Subcategories:

- Low Moderate Limited Clientele (LMC) – 51% of the beneficiaries of an activity have to be LMI**
- Low Moderate Area Benefit (LMA) – area where at least 51% of the residents are LMI persons**
- Low Moderate Income Housing Activities (LMH) - rental units and rehab units**

C.2. PROJECT SCHEDULE: Please estimate project completion timeline.

The Orange Empowerment Initiative will run as a 12-month program fully aligned with the City of Orange's FY 2026-27 CDBG program year (July 1, 2026 – June 30, 2027). Estimated Project Completion Timeline: July 1, 2026 – Program launch, final hiring of local facilitator, finalize MOUs with partners (Friendly Center, Families Forward, Orange County United Way), initial staff training, and setup of mobile delivery and partner sites. August 2026 – Recruitment and enrollment complete (target low-moderate income ZIPs and special needs groups via bilingual marketing, church/reentry outreach, partner referrals). Milestone: 125 participants enrolled across 5 cohorts. September 2026 – December 2026 – Deliver Cohorts 1 and 2 (12-week model, evenings/weekends 6-9 PM); mid-program evaluation (December 2026) with pre/post surveys and progress reporting. January 2026 – June 2027 – Deliver Cohorts 3, 4, and 5; ongoing job placements, certifications, and follow-up support; final placements and outcome tracking. June 30, 2027 – Program end. July 2027 – Final reporting, outcome documentation (80% certification rate, 70% placement in \$25+/hr jobs), and submission of closeout reports to the City. All activities will be completed within the FY 2026-27 grant period, with quarterly progress reports submitted as required. The program is designed for full expenditure and completion by June 30, 2027, with no extensions anticipated.

D. Demographics

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D. Demographics

Please provide the following information.

RACE/ETHNICITY

D.1. Estimate the number of clients for each Race/Ethnic categories your project will serve:

Race/Ethnicity	Estimate number of clients that will be served from/in each Race/Ethnic category:	If Previously Funded: Number of clients served from/in each Race/Ethnic category:
White	25	
Black/African American	30	
Asian	15	
American Indian/Alaskan Native	5	
Native American/Other Pacific Islander	5	
American Indian/Alaskan Native & White	5	
Asian & White	5	
Black/African American & White	10	
American Indian/Alaska Native & Black/African American	5	
Other Multi-Racial	20	
TOTAL	125	0

INCOME REQUIREMENTS

All funded projects and activities must meet the CDBG national objective of benefiting low to moderate income persons which is defined as “under 80% Area Median Income (AMI)”, (see current chart below). The AMI is subject to change based on HUD’s annual calculations and must be adjusted and adhered to throughout the life of the grant and subsequent affordability period.

FY 2025 Income Limits	1 Person	2 Persons	3 Persons	4 Persons	5 Persons	6 Persons	7 Persons	8 Persons
Extremely Low (30%) Income Limits	\$35,550	\$40,600	\$45,700	\$50,750	\$54,850	\$58,900	\$62,950	\$67,000
Very	\$59,250	\$67,700	\$76,150	\$84,600	\$91,400	\$98,150	\$104,950	\$111,700

Low (50%) Income Limits								
Low (80%) Income Limits	\$94,750	\$108,300	\$121,850	\$135,350	\$146,200	\$157,050	\$167,850	\$178,700

D.2. Please identify if your project will track income eligibility by household or by area:

Household

INCOME ELIGIBILITY:

- Eligible clients under this Contract shall be Extremely Low, Very Low, and/or Low-income individuals and/or families of all ethnic groups. Subrecipients shall document each participant's eligibility on intake sheets, or other such forms as to thoroughly document the client's household income.
- Agencies and organizations receiving CDBG funding must be able to document that the individuals, or households, or the area the project serves meets the HUD minimum 51% low to moderate-income requirement.
 - **Extremely low-income** which is defined as household income that is 30% or lower of the HUD median income for Orange County,
 - **Very low-income** which is defined as household income that exceeds 30% but does not exceed 50% of the HUD median income for Orange County, and
 - **Low income** is defined as household income at or below 80% of the median income for Orange County.

E. Measurements & Outcomes

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E. Measurements & Outcomes

Please provide the following information.

E.1. CONSOLIDATED PLAN ACTIVITY: (check one)

Affordable Housing (Create or Maintain)	<input type="checkbox"/>
Homelessness (Activities to end homelessness)	<input type="checkbox"/>
Community Development (Public Services or Public Facilities)	<input checked="" type="checkbox"/>

E.2. PERFORMANCE MEASUREMENT: The U.S. Department of Housing and Urban Development (HUD) requires a performance measurement system to better capture data for the activities that are undertaken with CDBG funding. For each proposed activity, an objective, an outcome, and performance indicator must be identified.

A. Primary Objectives: Check One

- Create Suitable Living Environment** – this objective relates to activities that are designed to benefit communities, families, or individuals by addressing issues in their living environment.
- Provide Decent Affordable Housing** – this activity focuses on housing programs where the purpose of the program is to meet individual family or community needs and not programs where housing is an element of a larger effort.
- Create Economic Opportunities** – this objective applies to the types of activities related to economic development, commercial revitalization, or job creation.

B. Primary Outcome: Check One

- Availability/Accessibility** – Activity that makes services, infrastructure and/or shelter available and accessible.
- Affordability** – Activity that provides affordability in the creation of affordable housing, transportation, or daycare.
- Sustainability** – Activity which promotes livable or viable communities or neighborhoods by providing services or by removing slums or blighted areas.

E.3. SPECIFIC OUTCOME INDICATORS: Number of Unduplicated Persons/Households to be assisted by this Program: 125 unduplicated persons (all individuals; no households counted separately as program serves participants directly).

Of the Total Persons Assisted, how many will:

Have new or continued access to this service or benefit:	125
Have improved access to this service or benefit:	125

Receive a service or benefit that is no longer substandard:	
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Of the Total Persons Assisted, the number of:

Homeless Persons Given Overnight Shelter:	0
Beds Created in Overnight Shelter or Other Emergency Housing:	0

F. Budget

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F. Budget

Please provide the following information.

F.1. Total budget must match the amount of funding being requested:

DIRECT COSTS:

BUDGET CATEGORY	PROPOSED AMOUNT OF CDBG FUNDS	PROPOSED AMOUNTS OF OTHER	TOTAL PROGRAM COSTS
Personnel Salaries	\$25,000.00	\$5,000.00	\$30,000.00
Supplies	\$12,000.00	\$3,000.00	\$15,000.00
Construction	\$0.00	\$0.00	\$0.00
Supplies/Other	\$24,000.00	\$7,000.00	\$31,000.00
TOTAL	\$61,000.00	\$15,000.00	\$76,000.00

F.2. OTHER SOURCES OF FUNDS (if applicable): Include all potential or anticipated funding sources, other local, State, or Federal Grants, conventional bank loans, tax credits, etc. Indicate the status of commitment of funding source, i.e. secured, committed or application pending with anticipated dates of final funding decisions. (click Add Row)

Type of Contribution	Source of Contribution	Estimated Amount	Status
In-Kind Contributions	LAWOI In-Kind Contributions	\$5,000.00	Secured
In-Kind Donations / Partnership	Spectrum Donations (in-kind/partnership)	\$3,000.00	Secured
Grants / Partnerships	Morehouse Grants/Partnerships	\$4,000.00	Anticipated
Private Contributions / Donations	Private Donations/Individual Contributors	\$3,000.00	Anticipated
		\$15,000.00	

G. Audit & Performance

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G. Audit & Performance

Please provide the following information.

AUDIT INFORMATION

G.1. Please provide the date of the most recent audit of your organization. Describe any findings or concerns which may have been cited in the audit or in any accompanying management letter particularly any pertaining to the use of CDBG funds. Also, describe any action taken to correct identified findings or concerns.

The Los Angeles Wealth & Opportunity Institute (LAWOI) is a startup 501(c)(3) nonprofit incorporated in 2025. No independent financial audit has been conducted for the most recently ended fiscal year (FY 2025, ended December 31, 2025), as total federal financial assistance expended was less than \$750,000 (primarily initial startup grants and no CDBG funds to date). Therefore, LAWOI is exempt from federal Single Audit requirements under 2 CFR Part 200, Subpart F (Uniform Guidance). The threshold for Single Audit increased to \$1,000,000 for fiscal years beginning on or after October 1, 2024, further confirming exemption for FY2025. LAWOI's FY2025 financial position is summarized in the attached Financial Summary (prepared in accordance with Generally Accepted Accounting Principles via internal records and management review): balanced operations with \$700,000 revenues/expenses, \$560,000 (80%) directed to program services, no material weaknesses in internal controls identified internally, segregated duties, monthly reconciliations, and board oversight. Projected FY2026 budget is \$750,000 balanced (88% direct program impact), supporting scaled expansion including this Orange program. No CDBG funds have been received or expended to date, so no findings, concerns, or management letter issues pertain to CDBG use. LAWOI maintains robust internal controls and is prepared to implement full audit protocols/subrecipient monitoring if/when federal expenditures exceed thresholds or upon award.

G.2. PAST PERFORMANCE:

A. Funding Expenditure Status. Enter dollar amounts

FY Year	Amount Awarded	Remaining
2025-26	\$0.00	\$0.00
2024-25	\$0.00	\$0.00
2023-24	\$0.00	\$0.00
TOTAL	\$0.00	\$0.00

B. Goals - If your agency was funded previously, were the stated goals met, and if not explain why and what your agency is doing to ensure these goals are met in the future:

Not applicable—LAWOI has not been previously funded by the City of Orange CDBG program (or any other CDBG jurisdiction) for this or any program. As a new applicant, there are no prior goals or performance metrics under CDBG to report. LAWOI's pilot workforce readiness and financial literacy programs (serving 400+ individuals pre-incorporation and in startup phase) achieved strong outcomes (75% job placement rate), demonstrating capacity. For the Orange Empowerment Initiative, goals are clearly defined and measurable: enroll 125 LMI Orange residents; 80% certification rate; 70% placement in \$25+/hr jobs; tracked monthly via Asana, pre/post surveys, and quarterly reports.

LAWOI will ensure success through: experienced staff (20+ years in relevant fields), local partnerships (Friendly Center, Families Forward, OC United Way), bilingual/culturally competent delivery, transportation stipends, and diversified sustainability (future CDBG, donations, \$750K FY2026 budget). No violations of federal funds have ever been made against LAWOI.

H. Required Documents

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H. Required Documents

Please provide the following information.

Articles of Incorporation

LAWOI_ARTICLES_OF_INCORPORATION.pdf

Board Minutes-Recent Board of Director's Meeting Minutes

LAWOI_BOARD_MINUTES.pdf

Bylaws

LAWOI_BYLAWS.pdf

Census Tract Table

LAWOI_CENSUS_TRACT.pdf

Low/Moderate Area Map

LAWOI_LOW_INCOME_MAP.pdf

Organizational Chart

Screenshot 2026-01-13 120818.jpg

Recent Audited Financial Statements

LAWOI_FINANCIALS.pdf

Service Area Map

LAWOI_SERVICE_MAP.pdf

Tax status-IRS 501(c)(3) Letter

LAWOI_TAX_STATUS.pdf

Timeline of Expenditures **Required*

LAWOI_TIMELINE_OF_EXPENDITURES.pdf

Timeline of Program/Project Milestones **Required*

LAWOI_TIMELINE_OF_PROJECT_MILESTONES.pdf

Other Documentation

LAWOI – 2026 – CDBG Application Attachments.pdf

Certification

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Certification

I hereby certify that all information contained herein and attached hereto is accurate to best of my knowledge:

Signature:

Ronald Keith Williams Jr.

Electronically signed by ronald@lawoi.org on 1/15/2026 10:50 AM

Title:

Executive Director