**2024 Community Impact Application**

Each year United Way provides the opportunity for non-profit organizations providing human services in Lewis, Marion, Monroe, Ralls, or Shelby Counties to apply to become a Community Impact Agency.

Community Impact Agencies benefit financially from the United Way's Annual Campaign, but are also granted a membership into the United Way providing additional publicity opportunities, notoriety, training, and more. This application is to apply for the distinction as a Community Impact Agency from May of 2024 to April of 2025.

In order to be eligible to apply, the work of organizations must align with United Way's areas of focus and priority areas. In depth information on those can be found on the United Way website at <http://unitedwaymta.org/community-impact>

Applications and all required documents are due to United Way by Friday, February 16th at 11:59pm.

**Agency Name:**

**Agency Director:**

**Director E-mail:**

**Agency Address:**

**City, St, Zip:**

**Agency Phone Number:**

**Website:**

**EIN:**

**Fiscal Year Start and End Date:**

**Application Contact Name:**

**Application Contact E-mail Address:**

**Application Contact Phone Number:**

**I certify I have the authority to submit this application on behalf of the organization.**

**\_ Yes**

**Organization's Mission Statement**

**Organization's Vision Statement**

**Provide a 25-word summary of your organization.**

**How many dollars are you applying for from the United Way of the Mark Twain Area?**

**Are you currently receiving dollars from the United Way of the Mark Twain Area?**

\_\_ Yes

\_\_ No

 **Have you ever received dollars from the United Way of the Mark Twain Area?**

\_\_ Yes

\_\_ No

 **What is your organization applying for funding from United Way for?**

\_\_ Specific Project/Program - dollars will be designated to only be utilized for a specific purpose.

\_\_ General Support - dollars will be considered general revenue to the organization.

**If applying for dollars for a specific project/program, name of the project/program.**

**Give a brief overview of the program(s) your organization implements. Provide headings above each program.
*\*\*If applying for specific project/program dollars give the overview of that project/program FIRST\*\****

**What data shows the work you would do with United Way dollars is needed in our community? Share the correlation between the programs you hope to implement with United Way funds and this data. Share the source of the data.**

**How does your organization measure the success of the programs it implements in the community? What kind of change/improvement does your organization anticipate seeing in the community by doing your work?**

**Are there other organizations in our community addressing the same need and implementing similar programs who serve the same geographic area as your organization?**

**If your organization would receive United Way funds, which focus area(s) would your work with these dollars align to?**

\_\_ Education

\_\_ Financial Stability

\_\_ Healthy Lives

\_\_ Equity

**Explain how your work would align with the selected focus area(s). Please ensure you have reviewed how United Way defines these focus areas.**

**If your organization would receive United Way funds, which priority area(s) would your work with these dollars align to?**

\_\_ Supporting Critical Services

\_\_ Providing Opportunities for Upward Mobility

**Explain how your work would align with the selected priority area(s). Please ensure you have reviewed how United Way defines these priority areas.**

**Describe the demographic makeup of the clients you would serve with funding from United Way. United Way prioritizes the needs of individuals who are marginalized (individuals living in poverty, minorities, children without parental support, etc.).**

**Dollars from the United Way of the Mark Twain Area can ONLY be used to support programs in Marion, Monroe, Ralls, Lewis, and Shelby Counties in Missouri. If you serve additional counties, how can you prove dollars are only used to support the work of these counties?**

**What other revenue streams are utilized to support the program you are applying to the United Way to receive funding for?**

**Explain the impact funding from United Way will have on the work of your organization if selected to receive funding from May 2024-April 2025.**

**Explain any collaborations with other agencies.**

**For Organizations that have received funding from United Way previously: How has your organization shown that your organization receives funding from United Way and partnered with the United Way organization?**

**Organization Best Practices Questionnaire**

Complete the following form answering questions relating to organization best practices. This information will not necessarily make an organization ineligible for status as a Community Impact Agency with United Way but might result in the need for additional information for United Way.

**PROGRAMS & MISSION:**

**Is your organization's mission statement able to be found prominently at your organization, on your organization's website, and on printed materials about your organization?**\_\_ Yes\_\_ No

**Does your organization ensure all programs of your organization align with the mission of the organization?**\_\_ Yes\_\_ No

**Does your organization have a strategic plan?**\_\_ Yes\_\_ No

**BOARD:**

**Does your organization have a board of directors that meets at least once a year to oversee the affairs of the organization?**\_\_ Yes\_\_ No

**Does your organization have a board of directors made up of a diverse group of people (age, gender, education, background, ethnicity, etc.?**\_\_ Yes\_\_ No

**Does your organization have a process to recruit new board members?**\_\_ Yes\_\_ No

**Does your organization provide training to new board members?**\_\_ Yes\_\_ No

**Has your organization reviewed its bylaws in the last 12 months?**\_\_ Yes\_\_ No

**Does your board approve the annual budget?**\_\_ Yes\_\_ No

**Does your board review financial statements on at least a quarterly basis?**\_\_ Yes\_\_ No

**Does your board annually disclose conflicts of interest?**\_\_ Yes\_\_ No

**Does your organization maintain meeting minutes for all board meetings?**\_\_ Yes\_\_ No

**How frequently does your board meet?**

**Does your organization's bylaws include term limits for board members?**\_\_ Yes\_\_ No

**Do all of your organization's board members give financially to the organization, or if they are unable to give financially, do they volunteer their time to the organization?**\_\_ Yes\_\_ No

**EMPLOYER QUESTIONS:**

**If your organization has employees, do you have an employee handbook?**\_\_ Yes\_\_ No
\_\_ N/A

**If your organization has employees, are there up to date job descriptions for those employees?**\_\_ Yes\_\_ No
\_\_ N/A

**If your organization has an Executive Director, is that director evaluated on an annual basis by the board of directors?**\_\_ Yes\_\_ No
\_\_ N/A

**FINANCE & LEGALITY:**

**In the last year has there been any government agency led investigations of your organization?**\_\_ Yes\_\_ No

**Is your organization registered with the Secretary of State's Office and is that registration up to date?**\_\_ Yes\_\_ No

**Did your organization file the IRS Form 990, 990-EZ, or 990-N in a timely manner (with in ten and a half months of your last fiscal year end?**\_\_ Yes\_\_ No

**Was a copy of the IRS Form 990 provided to the organization's board of directors before it was filed?**\_\_ Yes\_\_ No

**Has your organization reviewed its policies and procedures in the last 12 months?**\_\_ Yes\_\_ No

**Does your organization have a financial policy in place to oversee the paying of invoices?**\_\_ Yes\_\_ No

**Does your organization have a policy in place to reimburse employees or volunteers for expenses?**\_\_ Yes\_\_ No

**Does your organization have a policy in place for receiving cash and making deposits?**\_\_ Yes\_\_ No

**How much does your organization have in operating reserves per your most recent financial statement?**

**How many months does that operating reserves equate to in regards to average monthly expenses?**

**File Uploads**

Following are the required documents - United Way must receive ALL required documents by Friday, April 28th in order to be eligible to become a Community Impact Agency.

**Number of Individuals Served - Form found on Website - Upload as Spreadsheet**

**Organization Budget - Form found on Website or can use own format - Upload as Spreadsheet**

**Program/Project Budget (if applying for program/project dollars) - Form found on Website - Upload as Spreadsheet**

**Most Recent IRS 990**

**Federal IRS Determination Letter - Not required for returning applicants**

**For budgets over $300,000 please upload your most recent audit.**

**For budgets of $20,000-$300,000 please upload a Compilation Report prepared by a CPA (or bring a copy to the United Way Office if no full audit).**

**For budgets under $20,000, please upload most recent approved financial statement.**

**Board Member Listing - Form Found on Website - Upload as Spreadsheet**

**Key Employee Listing - Form Found on Website - Upload as Spreadsheet**

**Organization’s most recent Annual Report (if applicable)**

**Upload Agency's Bylaws - Required for new applicants, required for returning applicants if any changes have been made in past year.**