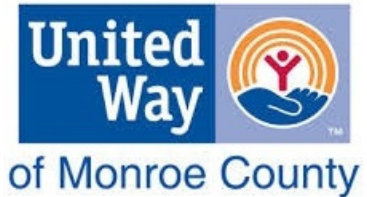


### Submission Instructions:

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- **Two (2) unstapled copies with original signatures** - Hand Deliver to 695 New Highway 68, Sweetwater, TN 37874 Suite D (Red Door) **or** Mail to P.O. Box 722, Sweetwater, TN 37874
- **ALSO, Email completed application** to [caylen.matoy@unitedway.org](mailto:caylen.matoy@unitedway.org). This is to send to our board of directors.
- Please use form provided. Any additional narratives should be clearly labeled and attached at the end of the application.
- Funding does not extend to:
  - Expense of maintaining a building, rental expenses, utilities, building insurance or property tax.
  - Programs run exclusively for or by the public or private school systems.
  - Programs serving animals.
  - Individuals, fundraisers, capital campaigns, endowments, sponsorships, marketing opportunities or sporting events.

Questions? Call 423-337-7690 or email [caylen.matoy@unitedway.org](mailto:caylen.matoy@unitedway.org)



## Partner Agency Application: Requesting Funds for 2024-2025

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**Application Deadline:** Third Thursday in April Each Year  
(Application filed late will not be considered) **Date of Application:**

\_\_\_\_\_

**(Legal Name of Organization)**

\_\_\_\_\_ is applying for  
\$\_\_\_\_\_ in the upcoming campaign in accordance with the Partner  
Agency Eligibility Requirements of the United Way of Monroe County.  
Previous Year Allocation: \$\_\_\_\_\_

**Agency Physical Street Address** (If agency has multiple locations within  
Monroe County please attach list of each location, contact name, number and  
address starting with main location).

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Mailing Address** (If different from above)

\_\_\_\_\_  
\_\_\_\_\_

**Main Number:** \_\_\_\_\_

**Alternate Contact Number** (United Way Office Use Only):

\_\_\_\_\_  
\_\_\_\_\_

**Executive Director:**

\_\_\_\_\_  
\_\_\_\_\_

**Hours Of Operation:**

**Email Address:**

\_\_\_\_\_

**Agency Website Address:**

\_\_\_\_\_

Year agency was established in Monroe County as a 501(c)3:

\_\_\_\_\_

**Number of Clients Served Last Year:**

\_\_\_\_\_

**Geographic Area Served:**

\_\_\_\_\_

**Focus Area** (choose one): \_\_\_\_ Education \_\_\_\_ Health \_\_\_\_ Income \_\_\_\_  
Basic Needs

**Fund Allocation Submission Form:**

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→ Attach Agency Mission Statement.

**Name of Program:**

\_\_\_\_\_

One application must be completed for each program the agency is requesting funding. Use a separate page if you need more than the amount provided to submit your answers. Just make sure that the question is restated with your provided answer.

→ Program Summary- Provide summary of the program for which funds are being requested. Who will be eligible? How many will be and/or have been served? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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- ➔ What vital needs of the community does your organization meet? What data exists to support this need? Data can be statistics from outside sources or information you've collected.

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- ➔ Have you seen positive results/change since this time last year with the use of United Way funding? If so, explain the positive impacts these dollars have made specifically (Existing Partners).

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- ➔ What are you doing as an organization to assist the client to "Break the Cycle" and not need your assistance in the future?

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- Did you request an increase in your allocation amount from previous year? If so, please explain. (If Applicable)

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- **Measuring Program Impact- Quantitative:** What quantitative (numerical) criteria will be used by your organization to determine that the program has been successful? Use as separate attachment if needed.

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- **Measuring Program Impact- Qualitative:** What qualitative (descriptive) criteria will be used to measure the program's impact? Use as separate attachment if needed.

Provide attachment of statistics or any other information showing the impact your organization and the services it provides has had on the community.

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- Please list the organizations you collaborate with. Explain the role each collaborating partner plays. Use a separate attachment if needed.

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- If you can provide an answer for the following question, it will be very helpful:  
How does this program decrease disparity or advance equitable outcomes for the marginalized racial, cultural or socioeconomic group (or another defined demographic group)?

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- How will you recruit participants for the program?

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- Please provide 1-2 goals for this program. You will not be asked to report specifically on these goals since they are hard to measure in one year. This information will help us to understand your goals for long-term impact.

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- Please provide 2-3 intended outcomes to reach your goal. Outcomes should be specific, measurable, attainable, realistic and time-bound. EX: By the end of the year, 75% of workforce training participants will receive a certification and gain employment.

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- If you can provide an answer for the following question, it will be very helpful  
What is your Diversity, Equity and Inclusion Goals (DEI)? How do they intersect with your intended outcomes?

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- How would you describe this program? (Not the organization but the program you are requesting funding)
  - New (Less than two years old)
  - Existing (More than two years old)

**Program Budget: Provide an attachment with itemized program budget which includes the following information:**

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- Anticipated expenses and income for the entire program for one year.
- Budget Narrative- Explain the program budget and specifically how United Way funds will be used. Include other sources of funding and amounts.
- What other investments will be made toward this program (additional grants, donations, etc.)?
- Plans to promote United Way as a funder: Organizations that receive United Way grant money are required to promote and raise public awareness of United Way of Monroe County on all marketing material. (*Examples include press releases, handouts at events, and signs that indicate that funding was provided by United Way of Monroe County.*) What are your plans to do so?

**Program Narrative: Provide an attachment with the following information:**

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- Client Success Story: Reflect on clients served within the program over the past twelve months. Share a success story.
- What success has this program seen in the past? This includes big picture outcomes, awards etc. This does NOT include individual client success stories.
- Two photographs demonstrating the program's success as a whole and/or with individuals. Only share individuals photographs that have approved their photograph being shared.



## Financial Reporting Requirements

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Please Provide the Following:

- Copy of IRS Determination Letter 501(c)3
  - EIN: \_\_\_\_\_ State of TN Registration CO# \_\_\_\_\_
  - Admin/Fundraising% \_\_\_\_\_  
How to compute your agency's overhead: Using your IRS 990, page 10, line 25, Column C (Management and General) divided by Page 10, Line 25, Column A (Total Expenses). If percentage exceeds 25%, please include a written plan to reduce the overhead to 25% or less.
  - Organizational Total Budget: \_\_\_\_\_ for fiscal year ending \_\_\_\_\_
  - Executive Director Annual Salary: \_\_\_\_\_
  - Most recent year-end financial report. Requirements are as follows:
    - ➔ United Way of Monroe County (UWMC) requires at a minimum, an annual Profit & Loss statement and Balance Sheet from the previous year for the organization. If your organization does an annual audit, UWMC will also request a copy of that audit, but an audit is not required by UWMC. Also, two officers (from the partner agency) that do not handle the money must certify that all the information being submitted to UWMC is true and correct with a penalty for perjury. Attached in this application is a form that the two officers will sign and turn in with the financials requested.
    - ➔ An audit is required for agencies with funding that exceeds two hundred thousand dollars (\$200,000) in a calendar year.
  - Most recent IRS 990 (Older than eighteen months will not be accepted)
  - Itemized list of exactly how United Way funds were spent the previous year.
  - Current Year Operating Budget
  - Does your agency have funds in reserve? \$ \_\_\_\_\_
  - List of Current Board of Directors and Meeting Schedule
  - Date & Time of all 2024-2025 Fundraisers
  - Include a three-sentence description describing your UW funded program. This will be used on our website if the program is awarded funding.
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**Partner Agency Penalty for Perjury Agreement:**

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Two officers (from the partner agency) that **do not** handle the money must certify that all the information being submitted to UWMC is true and correct with a penalty for perjury.

We have examined the information in the financial documents submitted and we have a reasonable belief that the information is true and correct:

I declare under penalty of perjury that the foregoing is true and correct.

Executed on \_\_\_\_\_ (MM / DD / YYYY)

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Signature of President/Chairman of the Board

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Printed name

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Signature of Second Representative from the Board of Directors

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Printed name

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Position or relationship to organization

## Partner Agency Eligibility Requirements:

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Read each requirement.

- The organization is an incorporated nonprofit organization under the laws of the State of Tennessee and has tax-exempt status under section 501(c)3 of the Internal Revenue Service code. Year agency became a 501(c)3 \_\_\_\_\_
- The organization must have been in operation and established as a 501(c)3 for at least two years to demonstrate it has a reasonable degree of continuity and permanence. Year established in Monroe County \_\_\_\_\_
- The organization has a Board of Directors that is an active, representative voluntary governing body, with regular meetings and is responsible for developing its mission, determining its strategic direction and providing oversight. The Board of Directors has inspected and approved annual audit or review, as well as the IRS Form 990.
- The organization has bylaws which state the organization's purpose, makes provisions for the size of the Board of Directors and provides rules for selection, tenure, number of officers and committees, financial and legal procedures, conflicts of interest and quorum requirements.
- The Board of Directors is responsible for ensuring that sufficient funds are available for the organization to meet its objectives and approve the yearly budget.
- The organization maintains current registration as a charitable organization with the Tennessee Secretary of State or has a current registration exemption from the Tennessee Secretary of State. State of TN Registration CO# \_\_\_\_\_
- The organization must provide services in Monroe County and its services are provided without discrimination in regards to race, color, religion, sex, national origin, age, disability, or veteran status.
- The organization will adhere to the funding agreement and will provide all documentation and reports needed to complete this request for funding.
- The organization will have *available upon request* reports detailing revenue sources, expenses and number of clients served.

- ➔ The agency demonstrates reasonable efficiency in program management and adequacy of resources, both in materials and personnel (voluntary and paid) to sustain a quality level of service.
- ➔ Organization certifies that all funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes, and executive orders. \_\_\_\_\_ (Initial Here)
- ➔ Eligibility for funding does not extend to the following: individuals, school fundraisers, capital campaigns or endowments, sponsorships, marketing opportunities, event fundraisers, or sports events.
- ➔ Agree to provide financials for each quarter and how many people were served during that time. \_\_\_\_\_ (Initial Here)

I understand that the organization must meet all of the above-mentioned criteria to receive funding from United Way of Monroe County.

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Name of Agency

Signatures of authorized parties:

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Agency Director Signature

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Board Chairperson Signature

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Date

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Date

## Policy on Supplemental Fundraising

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The Policy on Supplemental Fundraising establishes guidelines for direct community fundraising by organizations that have entered into a Partnership Agreement with United Way of Monroe County. The purpose of this policy is to permit the greatest amount of flexibility to Partner Agencies in conducting their own fundraising, at the same time ensuring the best possible climate and results for the United Way campaign.

United Way of Monroe County was created to raise funds in a community-wide effort on behalf of local agencies so donors are not solicited multiple times. It is also expected that Partner Agencies actively participate and promote the United Way campaign. In order to balance the relationship between donors, United Way and Partner Agencies, the following guidelines have been adopted: The following activity is prohibited year-round:

- Organized solicitation of employees at the workplace for contributions to a Partner Agency.

The following activities are prohibited during the period of September 1st through September 30th:

- Solicitation of corporate/business donations or sponsorships
- Mail, electronic, or telephone solicitations of the general public

The following types of activities are acceptable year-round:

- Client fees for services provided
- Grants (private and government)
- Service-related memberships
- Investment income, bequests, memorial funds and unsolicited donations
- Revenue from program activities and use of facilities
- Special events whereby tickets may be sold to the public. Purchaser receives a benefit, i.e. admission, right to participate, etc. **(Corporate funds/sponsorships may not be solicited for these events from Sept. 1-Sept. 30)**
- Product sales
- In-kind contributions

Sanctions: All Partner Agencies are expected to adhere to these policies. Willful disregard of these policies will be considered by the Board of Directors and may result in a reduction of the United Way allocation in the following funding year, or the agency not being funded.

United Way of Monroe County encourages Partner Agencies to notify the United Way office of the dates and nature of their special events so United Way can help promote the event.

**Additional Information**

Please include any additional information which you feel would be useful in helping us to evaluate this request. Remember that detailed plans regarding goal, proposed timetables, and overall strategy should be enclosed along with your guideline responses.

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Name of Agency

Signatures of authorized parties:

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Agency Director Signature

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Board Chairperson Signature

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Date

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Date

## Application Checklist:

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- \_\_\_ Completed Application with attachments clearly labeled and signed
- \_\_\_ Emailed Completed Application w/ attachments clearly labeled
- \_\_\_ 501(c)3 documentation
- \_\_\_ Agency Mission Statement
- \_\_\_ Completed Fund Allocation Submission Form and Attachments
- \_\_\_ Attached Program Budget and Attachments
- \_\_\_ Itemized list of how United Way funds were used in previous year
- \_\_\_ Current Organizational Budget
- \_\_\_ Completed Financial Reporting Requirements Form and Attachments
- \_\_\_ Partner Agency Eligibility Requirements filled out and signed
- \_\_\_ Most Recent Year-End Financial Report (Page 6 in Bold)
- \_\_\_ Most recent IRS 990 (within 18 months)
- \_\_\_ List of Current Board Members and Meeting Schedule
- \_\_\_ Proof of Directors & Officers Insurance
- \_\_\_ Program Materials (brochures, handouts, letterhead etc.)
- \_\_\_ One (1) recent success story from funded program  
    Include in your email application submission.
- \_\_\_ Two (2) program pictures from funded program  
    Include in your email application submission.

Are you a member of the Alliance of Better Nonprofits? YES NO  
<https://www.betternonprofits.org/>

Do you utilize the Volunteer East Tennessee platform? YES NO  
<https://www.volunteeretn.org/>