

United Way of Canadian County
Guidelines for New or Expanded Program Funding Requests

Agencies in Good Standing can apply for a new or expanded program in accordance with the established New and Expanded Program guidelines and criteria.

The Community Investment New Agencies and New or Expanded Programs Subcommittee reviews funding requests from agencies for new or expanded programs and requests from agencies applying to become a United Way partner. The Subcommittee submits funding recommendations to the Community Investment Committee. The Community Investment Committee submits the allocation recommendation to the United Way Board of Directors. Funding decisions are made at the discretion of the Board of Directors.

Funding requests will be accepted throughout the year. Those submitted by the March 1 due date will be reviewed for possible inclusion in the Community Investment process for funding to begin July 1 of that same year. Award notifications are made in late June of the application year.

Definitions

New Program - A program that is currently not receiving United Way funding.

Expanded Program - A program that is currently receiving United Way funding and additional funding of either \$25,000 or more, **or** 50% above current funding of that program, **whichever is greater**, is requested. An expanded program allows an existing program to serve more people, reach a new geographic area or target group, or maintain current services that have been partially funded by another source (excluding government contracts) that is now reducing its financial support.

Partner Agency in Good Standing – the agency meets all expectations for accountability and performance. They are listed in the annual United Way campaign materials, funds are raised on their behalf and are allocated through the annual Community Investment process.

Application Steps

1. Contact the Director of United Way of Canadian County to schedule a meeting. Submit a letter of application addressed to the New Agencies and New or Expanded Programs Subcommittee. The letter should summarize the funding request in one or two paragraphs.
2. Complete an application form to submit with the application letter. Use one form for each new or expanded program funding request. Application forms should be completed electronically. Manually completed application forms will not be accepted. Application forms are in Microsoft Excel. All cells that require completion by the agency are accessible. Cells that do not require agency information are locked for protection and are read only. Boxes within the form are sized by design. Responses must fit within the given space.
3. Include required attachments with the submission:
 - One Board of Directors roster. Board members must serve without compensation. This roster should include the following information for each member: terms, board attendance record (% of meetings attended within the past year), address including state of residency, telephone number, place of employment, job title and email address. Additionally identify the Board officers and position held.

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- Three budgets, one copy of each, (showing all revenue and expense line items) as follows:
 - One current fiscal year budget for the overall agency;
 - One current fiscal year budget for the specific program for which United Way funds are being sought; and
 - One proposed fiscal year budget for the specific program for which United Way funds are being sought.
 - Two copies of the most recent annual audit by a qualified and independent auditor (or CPA review, if revenues less than \$100,000, and a certified financial statement). If the auditor issued a Management Letter, please include two copies of the Management Letter along with two copies of the agency's written response to that letter.
 - Two copies of the current signed IRS Form 990, including all supplemental statements and schedule A. Reporting year should match that of the annual audit and signature must be that of an official from the agency (not that of an outside preparer). A 990 EZ form is insufficient documentation for membership with United Way.
 - One copy of the agency's most recent balance sheet.
 - Fifteen copies of the most recent Annual Report to the agency's Board of Directors.
 - Up to three additional pages of attachments or information. For example, a brochure or newsletter article would be one additional page.
4. Submit one complete hard copy of the letter of application and application form with all attachments by March 1. Late/incomplete applications may not be considered. In addition to the hard copy, e-mail an electronic copy of the completed application form and any attachments which are available in an electronic format to: cplemmons@unitedwayokc.org. For the hard copy submission, do not staple the pages together. Please use a paper clip, binder clip, folder, etc. Annual Reports and Audits may be submitted in their original printed format. The hard copy may be mailed to ATTN: Director, United Way of Canadian County, PO Box 850097, Yukon, OK 73085. Or, hand-deliver the hard copy to 1444 NW 28th Street, Oklahoma City, OK 73106.
5. Complete packages will be forwarded to the committee for review. The committee may choose to meet with selected agencies for further review and consideration during the Community Investment process. The Community Investment Committee prepares the allocation recommendations to the Board of Directors for consideration by the first week of June. Funding decisions are made at the June Board meeting.
6. Applicants receive notification letters by U.S. mail in late June.

Questions and technical assistance related to the Guidelines for New or Expanded Program Funding Requests or completing application forms should be directed to: Carol Plemmons, Director, United Way of Canadian County, 523-3580 or cplemmons@unitedwayokc.org.