



United Way of Van Wert County  
136 E. Main St. / Van Wert, OH / 45891  
419.238.6689 / director@uwwwco.org

## 2024 Agency Application Checklist

**In order to receive United Way funding you must provide the following to the United Way of Van Wert County by Friday, March 29th, 2024**

### 1. 2024 Request for funding (one for each program request) which includes

Application for Program Funding  
Number & Demographic of People Served  
Budget Form or attached Budget Sheet  
Board Member Roster  
Fundraising Information  
Program Success Story (one specific example of service(s) provided, written by a client served)  
Signed 2024-2025 Agency Agreement

### 2. ADDITIONAL information needed includes:

Balance Sheet as of February 29, 2024  
Profit & Loss statement for fiscal year 2023  
A copy of pages 1, 9, & 10 of your IRS 990  
A list of your board meeting dates

**Please attach any supporting documents that you have available for your proposal.**

*The following items need to be available upon request:*

- *Your most recent year-end audit review*
- *Proof of IRS current tax exempt status*
- *Your organizations by-laws*
- *All 2023 board meeting minutes*

### **Allocation/Designation Statement**

Due to the rise in Direct Designations, amounts directly designated may be taken into account by the Admissions and Review Committee. Designations will also be paid out quarterly along with Allocations given, unless otherwise arranged.

# United Way of Van Wert County: 2024 Application for Program

## Funding *Part 1: Basic Information*

**Agency:**

**Contact Person:**

**Address:**

**Phone Number:**

**E-mail for agency contact:**

**A&R Presenter Name, Email, and Phone:**

**Name of Program:**

## ***2024 Funding Categories***

Please select one or two of the funding categories listed below. In addition, fill in the percentage of funding with a brief description on how it will be distributed.

**Category 1: Basic Needs**                      %  
*Brief Description*

**Category 2: Education**                      %  
*Brief Description*

**Category 3: Health**                              %  
*Brief Description*

**Category 4: Financial Stability**                      %  
*Brief Description*

**What is the mission statement that guides this program's activities?**

**Briefly describe the program for which you are requesting funding.**

**Who is the targeted demographic for this program?**

**How is the impact of your program identified? Please attach any supporting research or data.**

**Is this a new program or a previous United Way funded program?**

**Allocations awarded to your program in 2023 (if applicable)**

**Have you used all allocated funding from the previous year?**

**Amount requesting for 2024:**

**How will United Way funds be allocated (based on %) in each of the following areas?**

**Salaries %**

**Location % (i.e. rent, utilities etc.)**

**Supplies % (i.e. books, materials, food etc.)**

**Equipment % (i.e. computers etc.)**

**Transportation %**

**Participant Activities % (i.e. field trips etc.)**

**If you are asking for an increase, please explain why.**

**In what ways would your program & clients be impacted, if United Way does not fully fund?**

**Identify other funding sources received by your program.**

**What is your long term stability plan for this program?**

**Identify collaborative work done with other agencies or groups (United Way of Van Wert Co and United Way partners).**

## *Part 2: Program Operations*

**What percentage of your budget is administrative costs?**

*\*\*This is derived by IRS Form 990 line 25 column C (management and general) added to line 25 column D (fundraising) and dividing the resulting total by line 12 (total revenue).*

**If you have 0% administrative costs, please be specific about how this is possible.**

**If your administrative costs are greater than 25% of total revenue, please explain why.**

**Do you have appropriate reserve funds of 3 months operating expenses?**

**Number of staff utilized to implement this program.**

**Part 3: Agency Participation in United Way campaign**

Has your agency participated in the United Way Campaign?

Did you give Campaign information to your staff in 2023?

If not, please explain why:

**Fundraising Activities**

List fundraisers you have planned between now and June 30, 2025

**Event:** **Proposed Date(s):** .  
**Anticipated Revenue:**  
**In-Kind Support:**

**Event:** **Proposed Date(s):**  
**Anticipated Revenue:**  
**In-Kind Support:**

**Event:** **Proposed Date(s):**  
**Anticipated Revenue:**  
**In-Kind Support:**

Do you require any assistance from the United Way for your Fundraiser to be a success?  
If so, in what ways?

## Number and Demographics of People Served

Agency Name:	
Funded Program Name:	
Define your unit of service:	

Please fill out this form for each program you are requesting to be funded			Total number of clients served:	
			Average cost per client:	
Area Served	Unduplicated Clients	Units of Service		
Van Wert City			Age ranges served	
Convoy			0-18	%
Delphos			19-30	%
Middle Point			31-40	%
Ohio City			41-50	%
Scott			51-60	%
Venedocia			61 & Over	%
Willshire			Gender Breakdown	
Wren			Male	%
Other			Female	%
			Income Level	

Ethnicity	
Caucasian	%
Hispanic or Latino	%
African American	%
Asian or Pacific	%
Native American	%
Not Recorded	%

Income Level	
Under \$20k	%
\$20k - \$30k	%
\$30k - \$40k	%
\$40k & Up	%

# United Way of Van Wert County: Definitions for Budget Form

## REVENUE

- United Way of Van Wert County**– Allocations and designations from UWVWCO for program funding.
- Contributions** - Revenue from contributions such as private donors, corporations, memorials, bequests, and trusts.
- Special Events** - Revenue from fundraising events.
- Legacies & Bequests** - Revenue from a donor's will and/or estate.
- Contributed by Associated Organizations** - Transactions between the different segments of your organization
- Allocated by Other United Ways** - United Way other than United Way of Van Wert County.
- Fees & Grants from Government Agencies** - State or Federal Grants, Payments for Services
- Membership Dues** - Cost of belonging to your organization.
- Program Service Fees** - Fees/Payment received for services delivered by the organization either paid by the client or reimbursed by non-governmental third party sources such as private insurance or fees from non-profit organizations.
- Sale of Materials** - Revenue generated by product sales.
- Investment Income** - Income generated from CD's/Savings accounts/Mutual Funds, etc.
- Miscellaneous Revenue** - Revenue that cannot be reported on another line.

## EXPENSES

- Salaries** - Salaries & wages subject to withholding earned by program's full and/or part-time employees.
- Employee Benefits** - Amounts paid and accrued by an agency under its own or other employee health or retirement benefit plans, including voluntary termination or retirement payments outside a formal plan.
- Payroll Taxes** - This includes Social Security (FICA) taxes, worker's compensation, insurance premiums (professional and liability), and unemployment compensation payable by employers under federal, state, or local laws.
- Professional Fees** - Fees and expenses of professional practitioners and consultants who are not employees of the agency but are engaged on an independent contract basis.
- Supplies** - Cost of materials and other supplies used by the program.
- Telephone & Internet**
- Postage & Shipping** - Cost for postage and mailings associated with the program/agency
- Occupancy**-Expenses incurred from a program's occupancy and use of leased or owned land, buildings, and offices. This includes heat, light, water, maintenance, property insurance, insurance liability, property tax, and mortgage interest.
- Equipment Rental/Purchase** - Cost to rent or purchase business machines.
- Printing**-Costs for printing and other informational materials produced outside the reporting agency.
- Travel** - Transportation costs for staff and volunteers for program/agency.
- Conferences, Conventions, Training & Meetings**- Registration, motel, dinners, for program/agency
- Specific Assistance to Individuals** - Momentary assistance directly to an individual
- Membership Dues** - Fee paid for staff to service club or other organization
- Awards** - For board members, volunteers, community
- Maintenance & Repairs** - Cost for maintenance and repair of business machines program/agency.
- Director, Officer, Board Insurance** - Professional Liability Insurance
- Miscellaneous Expenses** - Expenses that do not fit on any other line.

**NOTE: A supporting budget for the proposed program can be attached instead.**

<b>BUDGET FORM</b>		
Agency Name:	Program:	
What Is Your Program Year? Calendar _____ or Fiscal _____ to _____		
<b>Support Revenue and Expenses</b>		
	2023 Actual	2024 Budgeted
<b>PUBLIC SUPPORT &amp; REVENUE</b>		
Allocation from this United Way		
Contributions		
Special Events and Fundraisers		
Legacies & Bequests		
Contributed by Associated Organizations		
Allocated by Other United Ways		
Fees & Grants From Government Agencies		
Membership Dues		
Program Service Fees & Net Incidental Revenue		
Sale of Materials		
Investment Income		
Miscellaneous Revenue		
<b>Total Support &amp; Revenue</b>		
<b>EXPENSES</b>		
Salaries		
Employee Benefits		
Payroll Taxes		
Professional Fees		
Supplies		
Telephone & Internet		
Postage & Shipping		
Occupancy		
Rental & Maintenance of Equipment		
Printing & Publications		
Travel		
Conferences, Conventions, & Meetings		
Specific Assistance to Individuals		
Membership Dues		
Awards & Grants		
Maintenance & Repairs		
Director, Officer, Board Insurance		
Miscellaneous Expenses		
Payments to Affiliated Organizations		
Board Designations for Specified Activities for Future Years		
<b>Total expenses for budget period for all activities</b>		
<b>Excess (Deficit) of total support &amp; revenue over expenses</b>		



**Board Member Roster**  
**(An attached Board Roster will be accepted)**

***Board President***

**Name**  
**Email**  
**Phone**

***Board Treasurer***

**Name**  
**Email**  
**Phone**

***Trustees***

**Name** **Phone**

**Name** **Phone**

**Name** **Phone**

**Name** **Phone**

**Name** **Phone**

**Name** **Phone**

**Name** **Phone**

**Name** **Phone**

**Name** **Phone**

**Name** **Phone**

**Name** **Phone**

**Name** **Phone**

**Name** **Phone**

## 2023 Program Success Story

**Agency Name:**

Provide an example of how this program has impacted someone. We may use this story in marketing to demonstrate how donations to the United Way of Van Wert County help create lasting change in our community. Change names or identity details, if necessary.

# United Way of Van Wert County: 2024 Admissions Guidelines

## **1. BE INCORPORATED, NOT-FOR-PROFIT AND IRS TAX EXEMPT.**

The United Way has the responsibility to verify that the recipient organization has been ruled tax exempt by the Internal Revenue Service.

## **2. OFFERS HUMAN SERVICE PROGRAMS.**

The United Way of Van Wert County, Inc. will consider organizations with a worthy education, character building, health, or social service program.

## **3. PROVIDES COMMUNITY SERVICE BASED ON DOCUMENTED NEED(S).**

The agency/program should address itself to an identifiable current need, demand, or problem in the community. Services which are supported by voluntary dollars should be clearly defined and their impact documented by the organization.

## **4. NON-DISCRIMINATORY.**

All agencies are to provide equal opportunity in all areas of service and employment, both paid and volunteer. There shall be no discrimination against any person on the grounds of race, creed, religion, sex, age, handicap, national origin, or ancestry.

## **5. HAS AN ACTIVE, ROTATING, VOLUNTEER LEADERSHIP THAT REPRESENTS THE DIVERSE ELEMENTS OF THE COMMUNITY.**

The agency's Board of Trustees or governing body should consist of volunteers who participate in the policy-making processes, represent the diverse elements of the community, periodically rotate off the board, and meet at least quarterly.

## **6. HAS SOUND FINANCIAL AND PROGRAM MANAGEMENT.**

Demonstrated ability to manage the finances of the program/services in accordance with generally accepted accounting principles. Programs that run surpluses do not have the same priorities as programs that have balanced budgets. Programs that forecast operating deficits are not considered fiscally sound. What we need is a balanced budget and your job as program director/executive director is to provide that for your board, the community, and the United Way volunteers.

## **7. AGREES TO SUPPORT AND COOPERATE WITH THE UNITED WAY IN THE FOLLOWING AREAS: (1) FUNDRAISING & CAMPAIGN, (2) PLANNING, (3) COMMUNICATIONS AND (4) ALLOCATION PROCESS**

The agency's relationship with the United Way revolves around four primary areas: Raising voluntary contributions, planning for the needs of the total community, communicating their services and United Way affiliation to the public, and cooperating in the allocation process.

## **8. AGREES TO NOTIFY THE UNITED WAY BEFORE ENGAGING IN ANY SUPPLEMENTAL FUNDRAISING EFFORTS.**

Efforts by agencies to develop sources of income should be carried out in such a manner to assure that the United Way giving base in the community will not be adversely affected and that the United Way is fully informed and supports, in advance, special financing efforts undertaken by the agency.

## **9. COLLABORATE WITH OTHER ORGANIZATIONS.**

All agencies or organizations are encouraged to develop working relationships among other United Way member agencies to encourage collaboration and cooperation in order to improve service delivery. Duplication of services is strongly discouraged.

## **10. MEASURE PROGRAM EFFECTIVENESS.**

All member agencies must measure United Way funded programs for program effectiveness

## United Way of Van Wert County: 2024 Appeal Process

Any organization requesting funds from the United Way of Van Wert County, Inc., has the right to appeal the decision of the Admissions and Review Committee. The appeal process is as follows:

The United Way of Van Wert County, regarding funding for the coming year notifies all organizations, in writing. Any organization who is not satisfied has ten (10) working days to notify the United Way of Van Wert County office in writing that it requests an appointment with the Executive Director to review the funding application and the factors involved regarding the Admissions and Review Committee's funding decision.

If the appointment with the Executive Director does not resolve the situation, the organization has ten (10) working days (after the appointment with the Executive Director) to notify the United Way office in writing that it desires a meeting with the Admissions and Review Committee.

The Executive Director, acting as secretary for the Admissions and Review Committee will notify the organization of the committee's funding decision in writing within ten (10) working days after the committee's interview with the organization.

If the situation has not yet been resolved to the organization's satisfaction, the organization must notify the United Way of Van Wert County office within ten (10) working days of receiving correspondence regarding the committee's decision that it desires an appeal to the Board of Trustees and the Executive Board.

The Executive Director, acting as secretary for the Board of Trustees and the Executive Board will notify the organization of the appeal decision in writing within ten (10) working days after the meeting with the boards.

# United Way of Van Wert County: 20**24-25** Agency Agreement

This agreement is entered into with the belief that:

- (a) The participation of representative citizens in community-wide planning, budgeting, and fund raising for social services is essential;
- (b) Coordinating fund raising is the most efficient way to provide for the financial needs of voluntary health, welfare, and character building agencies;
- (c) The promotion of efficient, economical operation and the establishment and maintenance of high operating standards are essential to the social, health, and welfare services delivery systems.

1. The United Way of Van Wert County, Inc. agrees to the following:

- A. Operate under the management of an active, elected, local volunteer board.
- B. Provide services on a non-discriminatory basis.
- C. Use its best efforts to organize, direct, and conduct an annual campaign through board, agency, and volunteer support.
- D. Allocate and distribute funds through a system, which utilizes a review process, and distribute funds for identified community needs.
- E. Work with United Way agencies and other community agencies to identify both ongoing and emerging community needs and help achieve solutions to community problems in a spirit of collaboration and cooperation.
- F. Promote member agencies programs/services to the community, assisting in all appropriate ways on behalf of those agencies on a year-round basis.
- G. Recognize the autonomy of member agencies and exercise only those controls that are reasonably necessary for the effective and successful operation of the United Way.

2. The participating agencies agree to the following:

- A. Operate under the management of an active board and meet the requirements of the agency's by-laws.
- B. Qualify as an incorporated, not-for-profit, and IRS tax-exempt organization.
- C. Submit in a timely fashion to the United Way all necessary information for the budgeting process, including but not limited to; annual budget proposal, service statistics, yearly audit or financial reports, supplemental fund raising plans, and current board list.
- D. Provide services on a non-discriminatory basis.

- E. Cooperate with United Way of Van Wert County in furnishing any data or pictures, not covered by confidentiality, to use for public relations activities.
- F. Cooperate to the fullest extent possible in the annual fundraising campaign activities of the United Way of Van Wert County. Participation will include, but not be limited to: participation in the campaign, company campaign presentations, fundarisiers, solicitation, the annual all agency meeting, and other presentations.
- G. Utilize all opportunities to inform the public of the mutual values of United Way of Van Wert County relationships to the community and to make known that the agency is a recipient of community support through United Way. This includes: websites, press releases, and social media.
- H. Notification within 30 calendar days of personnel changes that directly oversee the fiscal distribution of United Way of Van Wert County funds and/or other material changes affecting the agency.
- I. In compliance with the USA PATRIOT ACT and other counter terrorism laws, the United Way of Van Wert County requires that each agency certify the following:

The signing of this Agency Agreement by representatives of the grantee certifies that all United Way of Van Wert County funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes, and executive orders.

**Please print and sign the Agency Agreement form on next page.**

After you, sign the Agency Agreement form:

- scan and send to UWWWCO by email, along with your application
  - director@uwwwco.org
- mailed to
  - United Way of Van Wert Co. 136 E Main St., Van Wert, OH 45891
- Deliver to the UWWWCO office

# United Way of Van Wert County: 20**24-25** Agency Agreement

By signing below, the agency director and officers of the board:

1. Agree to this application for funding for the campaign year 2024-25 which runs from
  - a. July 1, 2024 – June 30, 2025
2. Agree the application provides accurate statements.
3. Have read, fully understood, and accepted The Admissions Guidelines, Fundraising Policy, Agency Agreement, and Appeals Process.

Agency Name: \_\_\_\_\_ Date: \_\_\_\_\_

Agency Board Officer: \_\_\_\_\_

Agency Executive Director: \_\_\_\_\_

United Way of Van Wert County, Inc. \_\_\_\_\_ Date: \_\_\_\_\_

United Way Board Officer: \_\_\_\_\_

United Way Executive Director: \_\_\_\_\_