



Community Investment Policies & Procedures

Form C3i. (for organizations new to United Way)

REQUEST FOR CONSIDERATION TO ENTER UNITED WAY FUNDING PROCESS

Name of Applicant Agency _____

Proposed Program Name _____

Mailing Address _____ Zip code _____

Contact Person _____ Phone _____ Email _____

Executive Director (signature; date) _____ Date _____

Board President (signature; date) _____ Date _____

Your mission and its relationship to United Way of Racine County Community Priorities

- Please describe your mission and attach supporting materials (i.e., mission statement, brochure, annual report)

- Which specific United Way of Racine County priority outcomes will your program address? (see www.unitedwayracine.org for priority area logic models)

- How do you measure client/participant progress toward your program's desired outcomes?

- How do you ensure the quality and efficiency of program services?

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REQUEST FOR CONSIDERATION TO ENTER UNITED WAY FUNDING PROCESS (continued)

Your Governance

- Provide copies of the following documents: *(If you do not have the following documents, please explain)*
 - A. Articles of Incorporation
 - B. IRS tax exemption letter
 - C. By-laws and/or governing documents
 - D. Organizational chart/description of agency's organizational structure
(inclusive of staff and volunteers)
 - E. Board Member list of names and addresses, along with committee(s) structure

- Have you been nationally accredited or received state licensure? If so, by whom?

Your Financial Accountability

- Please provide:
 - A. Audit and copy of auditor's management letter for most recent year. (If no audit is conducted, provide highest level of externally prepared financial statements available with balance sheet)
 - B. Most recently filed IRS Form 990
 - C. Current organizational operating budget and most recent completed organizational budget compared to actual results
 - D. Name of person(s) responsible for regularly reviewing financial statements (staff and/or volunteer)

- If you answer yes to any of the following questions, please briefly explain.
 - A. Are you anticipating major changes in your agency? (i.e. funding, size, direction, etc.) Y N

 - B. Do you have any pending legal actions that would affect your reputation or ability to pursue your mission? Y N