

United Way of the Mark Twain Area
“To increase the capacity for people to care for one another”
2018 Funding Request Application

Hello Agency Leadership!

We are excited that you will be applying to become a participating agency during the 2018-19 fiscal year! Any group or organization may apply to become a participating agency of the United Way if they are a tax exempt organization and provide human services within the United Way of the Mark Twain Area (Lewis, Marion, Monroe, Ralls, and Shelby counties in Missouri).

You will need to complete all aspects of this funding request application to be eligible to become a participating agency of the United Way of the Mark Twain Area and receive monthly funding distributions during the 2018-19 fiscal year (November 2018-October 2019). Please ensure you complete ALL of the following required elements of this application. The following documents must be returned to the United Way of the Mark Twain Area office no later than **Friday, April 13, 2018 at 4pm**.

Documents to Complete (Need 22 copies of each, hole punched for standard 3 ring binder):

Section 1: Contact information and Board Approval

This section allows the United Way to have needed contact information and know that staff at the agency has had board approval to submit the application.

Section 2: Grant Narrative

This section allows the United Way to understand the mission, programs, correlation with the United Way's key initiatives, request amount, budgetary information, etc.

Section 3: Overhead and Operating Reserve

This sheet allows the United Way to have an understanding of your organization's financial responsibility.

Section 4: Organizational Budget

This sheet gives the overall budget for the organization so the United Way can see how dollars are being acquired and being spent.

Section 5: Explanation of Restricted Funds

This sheet helps the United Way understand the restricted funds of the agency.

Section 6: Explanation of Board Designated Reserves

This sheet shares about reserve funds oversight by your agency's board.

Section 7: Personnel Positions and Salaries

This sheet shares the positions and salaries that are within your agency.

Additional Documents (Need ONE copy of each):

- **Signed Agency Agreement by Agency Director and Board President**
- **501(c)(3) tax-exempt certification (federal letter and Missouri letter – both required)**
- **Budgets over \$100,000: Provide a full audit prepared by a CPA**
- **Budgets of \$20,000-\$100,000: Compilation Report prepared by a CPA (if no full audit)**
- **Budgets under \$20,000: Financial Statements (if no full audit)**
- **Copy of agency 990 or 990EZ**
- **Complete Board Member listing with names, addresses and phone numbers.**
- **If available, a copy of the agency's annual report**
- **Agency's bylaws**

Please feel free to call the United Way office at 573-221-2761 or e-mail denise@uwmta.us with any questions you might have while completing the funding request application.

Thank you!