



United Way of the Ozarks, Inc.

Overview for New Agencies Applying for United Way Funding

To be considered for funding by United Way of the Ozarks, Inc., specific criteria must be met and subsequent steps must be completed. The first step is to meet the requirements below; you must be able to answer yes to all questions in this section in order to be eligible to apply for funding. (For each question, please circle "Yes" or "No").

1. Is your organization a 501 (c) 3, and have you been incorporated and actively conducting business for at least 2 years? **Yes No**
2. Does your organization have a local presence? **Yes No**
3. Is your organization a health or human service organization that addresses a critical unmet need? **Yes No**
4. Do the program(s) for which you intend to request funding *not* duplicate any other programs currently funded by United Way? **Yes No**
Areas are:
 - a) Access to Healthcare
 - b) Basic Needs and Self Sufficiency
 - c) Children at Risk
 - d) Healthy Families
 - e) Safe Neighborhoods
 - f) Successful Youth
5. Is your organization audited by a CPA firm on an annual basis? **Yes No**
6. Does your organization submit a Form 990 to the IRS on an annual basis? **Yes No**
7. Does your organization have a diverse Board of Directors that meets regularly? **Yes No**
(A diverse Board of Directors would consist of: members representing various cultures, a mix of genders, and various business and financial backgrounds. The members should reflect a cross section of your community).
8. Does your organization have a written reserve policy? **Yes No**
9. Does your organization follow a strategic plan that is reviewed and revised on a regular basis? **Yes No**

If you answered "Yes" to all questions above, you are ready to submit the following for financial certification:

Required Documentation for New Agency Request

- _____ A copy of your ***most recent*** IRS Form 990 (*this may be printed duplex*)
- _____ A copy of your ***most recent*** audit (*this may be printed duplex*)
- _____ Federal tax exempt letter or letter stating affiliation with government or school group
- _____ Agency annual budget
- _____ Agency balance sheet
- _____ Year to date statement of financial activity (revenue and expenses)
- _____ Reserve policy with explanation
- _____ Agency's most recent annual report
- _____ A one page description of the program(s) with program budget, that you will be submitting for funding

Submission

Please submit your completed documentation to United Way of the Ozarks, 320 N Jefferson, Springfield, MO 65806, Attn: Becky Morgan. This information may be mailed or hand delivered.

United Way is pleased to offer funding to agencies that are viable, financially sound organizations that will provide a needed service to our community. Your information will be reviewed by the Community Investment team. You will be notified of the outcome of this review.

If you have any questions before your submission, please call Becky Morgan, Director of Community Investment, at 863-7700 ext 240 or email at bmorgan@uwozarks.com.