



Allocation Application Manual

Purpose

This application manual is designed to help your agency understand United Way of Highway 55's allocation philosophy, as well as explain the allocation process and schedule – so that you may construct a successful application for funding.

After Reading This Manual Applying Agencies Will Understand...

- The United Way of Highway 55's current allocation philosophy.
- What is required to submit a full application.
- What is expected of them if they are an accepted United Way agency.
- The allocations payout schedule.
- What it takes to build a good application.

Support

Contact United Way of Highway 55's Executive Director, Ashley Abraham, if you have any questions, concerns, or issues with this application. The Executive Director is **not** a voting member of the allocation committee. Her responsibilities with the allocation program include: raising funds, managing the allocation process, training the committee on United Way of Highway 55's allocation philosophy, assisting agencies with the allocation process, and distributing funds. Please contact her at Director@Highway55UnitedWay.org or 931-455-5678.

Table of Contents

Allocation Philosophy 3

Allocation Program Schedule4

Applying Agency Process.....5

Agency Commitments 6

Forms

Agency Application 8

Monthly Agency Report Form Instructions15

Monthly Agency Report Form Instructions 16

Allocation Philosophy

What We Believe

United Way of Highway 55 operates under the belief that all our neighbors deserve a chance to succeed and live a vibrant life here at home.

What We Fund

We support four areas that build a good quality of life and a strong community – education, income, health, and essentials.

Education

The United Way supports education to help children, youth and young adults reach their full potential. We support programs that teach children, youth, or young adults – as well as programs that ease the physical, mental, or financial burden of accessing education.

Income

The United Way promotes financial stability and independence for families and individuals. The United Way supports programs that assist individuals through proven methods, such as job training, financial wellness classes and more.

Health

The United Way supports programs that encourage healthy living, including programs that promote healthy eating and physical activity, expand access to quality health care, and integrate health into early childhood development.

Essentials

We understand that people must be fed and safe before they can focus on education, income, or health. Essentials are defined as knowing where your next meal is coming from and having a safe place to sleep at night. Therefore, we support access to food, water, shelter, and safety.

Local Donors, Local Needs

The money we raise goes to programs that serve Coffee, Moore, and Warren counties. **No national office dictates how we allocate our funds.** This means that local people, who understand local problems, can decide where their donations go. We have the freedom to support the unique needs of our community how we see fit.

More than Money

Our allocation program is only one aspect of what we do. Our agencies receive more than money. United Way of Highway 55 works with our agencies to build a network of support that includes donors, advocates, and volunteers. We want to Live United, fostering a collection of resources that help our agencies.

Allocation Program Schedule

Application Process

March 15: Call for Applications

April: Allocation Committee Training

April 15: Deadline for Applications

April 27, 28, & 29: Agency Interviews

May: Allocations Committee Meets to Select Agencies

June: UWHWY55 Supported Agencies Announced

August: 1st Quarter Allocation checks distributed

Allocation Payout Schedule

August: Allocation 1

November: Allocation 2

February: Allocation 3

May: Allocation 4

Monthly Agency Reports

Due the 5th of every month: Email director@highway55unitedway.org overview of the month including important numbers, services provided, and an impact story.

Bolded text applies directly to agencies. Italicized text reveals United Way of Highway 55's administrative deadlines that may be helpful for you to know.

Applying Agency Process

Call for Applications

The Executive Director of United Way of Highway 55 will announce that applications are being accepted for consideration. The director will email current UW supported agencies to inform them. The United Way will also publicize the call for applications via Highway55UnitedWay.org, social media, and through various local news and media outlets.

Applications Due

All required application materials are due by midnight on the application due date. If an organization fails to submit every component of the application by this time, they will not be considered for allocations. Applications may be mailed in or hand delivered, but emailed applications are preferred.

Committee Meetings

Applying agencies will receive an email from the Executive Director, asking them to select a timeslot for a meeting that will occur in May. These are 20-minute meetings with the applying agency, at least one representative of the allocation committee, and United Way of Highway 55's Executive Director. The agency will be asked specific questions and given the chance to explain their application further.

Announcing UW Agencies

United Way of Highway 55's Executive Director will inform all applying agencies whether or not they gained UW support for the next allocation cycle. The selected agencies will be publicly announced via social media, newspaper, and radio.

Allocation Distribution

Agencies will receive their allocation in four payments. Allocation checks will be mailed in August, November, February, and May.

Monthly Allocation Report Forms

Supported agencies **must** submit a Monthly Agency Report form by the 5th of every month. Agencies can email the report or fill it out at <https://highway55unitedway.org/allocations/>.

Applying Agency Commitments

Any agency applying for support by United Way of Highway 55s Allocation Program agrees to:

1. Submit all application materials by midnight on April 15th.
2. Send a representative to a 20-minute Allocation Committee meeting that will be scheduled end of April.
3. If accepted as a United Way of Highway 55 supported agency, you will agree to the supported agency commitments list (provided below).

Any agency supported by the United Way of Highway 55 Allocations Program agrees to:

1. Use allocated funds to serve residents of Coffee, Moore, and Warren counties.
2. Use allocated funds as the agency described on the application and in the allocation committee meeting.
3. Complete and turn in Monthly Agency Report forms by the 5th of every month. In December send the year review/stats.
4. When able, have representative(s) present for United Way promotional and fundraising events.
5. **Be available to take a photo for the newspaper announcing United Way's 2022/23 partnering agencies.**

Applying Agency Application

A Complete Application Includes:

- Completed Application
 - Basic Information Form
 - Program Narrative
 - Program Budget
 - Volunteer Needs Form
 - Agency Commitment Form
 - Suspension of Funds Agreement
- Copy of Most Recent Form 990
- Copy of IRS Tax Exemption Letter
- Copy of a Letter from the TN Secretary of State's Division of Charitable Solicitations office that shows you are in good standing with state registration requirements.
- An updated portfolio on 211tn.org. Go to the homepage, click the 'Add Your Agency' button to the right.

**All application materials must be received
by midnight on April 15, 2022 to be
considered.**

Instructions

Please fill out the following application by typing in relevant information. In one email include this filled-out application and attach the three requested documents listed above. Send your application to Director@Highway55UnitedWay.org, and title your email "[Agency Name] Application." Please call or email us with any questions.

Contact

Ashley Abraham, United Way of Highway 55 Executive Director

(O) 931-455-5678

(C) 615-478-4425

Email: Director@Highway55UnitedWay.org

Basic Information Form

Contact

Agency Name:

Agency Contact:

Email:

Phone:

Phone 2:

Eligibility

Please place an X beside each eligibility criteria that applies to your agency.

We are a 501(c)3 organization that has received a certificate of exemption from the United States Internal Revenue Service or a public sector organization.

We have been a 501(c)3 organization for at least a year.

We have an educational, health, welfare, or human services program.

We directly benefit residents of Coffee, Moore, Warren Counties.

We have an office in Coffee, Moore, Warren County.

Mission Statement

List of Current Board Members

Programs

Partnerships

Please list and describe partnerships you have with other agencies, organizations, government, etc.

Program Narrative

Please describe the program(s) for which you are requesting funds. Include the program's services, goals, history, and information about the program's success. Please describe how this program supports one of United Way's four funding areas – education, income, health, or essentials. Please describe how you would use United Way funds. You may type your narrative below or attach your narrative to your application.

Program Budget

Please include an itemized budget for the program(s). If you are requesting general operating funds that are not program specific, please include your organization's operating budget.

Volunteer Needs

Through our community connections and relationships – The United Way of Highway 55 works to assist our partners in acquiring necessary community volunteer assistance. Please provide a list of volunteer needs and opportunities your agency may have.

<u>Volunteer Opportunity</u>	<u># Volunteers Needed</u>	<u>Date of Activity</u>
------------------------------	----------------------------	-------------------------

Applying Agency Commitment Form

Any agency applying for support by United Way of Highway 55’s Allocation Program agrees to:

- 1. Submit all application materials by April 15th
- 2. Send a representative to a 20-minute Allocation Committee meeting that will be scheduled for end of April. Specific dates/times provided by the Executive Director.
- 3. If accepted as a United Way of Highway 55 supported agency, we agree to the supported agency commitments list (provided below).

Any agency supported by United Way of Highway 55’s Allocation Program agrees to:

- 1. Use allocated funds to serve residents of Coffee, Moore, and/or Warren counties.
- 2. Use allocated funds as we described on our application and in the allocation committee meeting.
- 3. Complete and turn in Monthly Agency Report forms by the 5th of every month. In December provide year review/stats.
- 4. When able, have representative(s) present for United Way promotional and fundraising events.
- 5. **Be available to take a photo for the newspaper announcing United Way’s 2022/23 partnering agencies.**

I _____ from agency _____ agree to uphold the commitments listed above to the best of my ability.

Signed _____ Date _____

Suspension of Funds Agreement

According to the United Way of Highway 55's By-Laws Section 12.3 Suspension or Discontinuance of Funds, the Executive Director, with the approval of the Allocations Committee, may suspend payment of all or portion of the funds allocated to a recipient agency or organization, if the Allocations Committee determines that the agency or organization has failed or is failing to abide by the current board-approved requirements and criteria for allocations. The Executive Director may restore the allocated funds when the Allocation Committee is satisfied that the agency or organization is in substantial compliance with the requirements and criteria for allocations procedures. Any actions taken by the Executive Director shall be submitted to the Board of Directors for approval and ratification at the earliest scheduled meeting.

When it has been demonstrated to the Board of Directors' satisfaction that funds have been misappropriated or misused or are about to be misappropriated, the Board of Directors may immediately discontinue the allocated funds to any agency or organization.

I, _____ have read and understand the statement above.

Signed _____ Date _____

Monthly Agency Report Form Instructions

WHY

Good statistics raise money. They show donors that you are making real progress and have a real impact. United Way of Highway 55 wants to collect good statistics in order to raise more funds for your agency. We share these statistics with our donors and potential donors in social media posts, solicitation pitches, and thank you notes.

THE FORM

AREA STATISTICS: United Way funds four areas that we call "building blocks of community success" - Education, Income, Health, and Basic Essentials. In this section on the form, please provide statistics that speak to each area. Examples:

- **Education:** *We spent 120 hours teaching 23 children basic math, reading, and writing skill. We offered three classes to our clients on how to find jobs.*
- **Income:** *By offering spay and neutering services, we saved community members \$300 this month. Or, by watching 23 children, five days a week, at subsidized/no cost to parents, we allowed parents to work 600 hour and earn approximately \$6,000.*
- **Health:** *We served 300 healthy meals to 23 children. Or, we taught 13 teenagers about personal hygiene.*
- **Basic Essentials:** *We offered shelter to 8 homeless neighbors.*

OTHER STATISTICS: Here, you can put any statistic that is relevant to your work that does not directly fit in the area statistics. Example:

- *We offered emergency services to 8 women suffering from domestic violence.*

COSTS: Cost statistics really motivate donors. For example, if I tell a donor it costs \$52 to offer emergency shelter services to domestic violence victims for one night, they will very likely donate at least \$52. I've seen it happen many times - someone was thinking about donating about \$25, then I provide a costs statistic, and that bumps up their contribution. Examples:

- *It costs \$52 to shelter a victim of domestic violence for one night in an emergency hotel.*
- *It costs \$100 to get one puppy vaccinated.*

STORY: Here, you can share an inspiring story, anecdote, etc. that would help donors understand the personal impact you have on your clients and community. Example:

- *The Humane Society saved the life of Dot, a six year old Chihuahua suffering from an infection. We paid for the medication that would allow her to live. Not only is Dot a happier pooch, but her owner, Elizabeth, who suffers from an illness that keeps her home and frequently isolated from friends and family, is happy to have her companion back.*

You do not have to fill out every space on the form. Just provide the information that makes sense for your organization.

Monthly Agency Report Form

Agency Name:

Month/Year:

AREA STATISTICS

Education:

Income:

Health:

Basic Essentials:

OTHER STATISTICS

COSTS

STORY