

United Way New Agency Initial Application Tips and Hints

General Information

The agency name will be the organization's name as identified on federal and state documents.

In your agency description, please explain your agency to highlight your services and impact on the community and the community's need for your agency.; your elevator pitch.

If your agency does not have a CEO or ED, please include the primary decision maker for the agency and clarify their position in the comments section.

Please paste your mission statement as approved by your board in the appropriate box. In the brief history, provide details on when your agency was founded, the area you serve, and how you have grown to meet client needs.

Programs

All previous fields must be filled out to access the "Programs" section. Please click on the + to add a program.

The United Way funds programs/services that your agency provides but will not cover 100% of the cost of that program. Programs should be based in and serve Smith County residents. On the program page, please add the program title you seek funding for. The address will likely be the same as the agency's. The program description should describe the access you wish to offer and how it addresses education, health and wellness, crisis intervention, or financial stability for community members. If there is a specific person we should contact regarding this program, please include their contact information. Otherwise, repeat the primary contact from the main page. You may utilize the comment box to explain this contact.

You can add as many programs as you would like to have considered but only need to include some programs your agency participates in. This is to help the committee decide if your agency assists the community that needs funding based on our priorities (health and wellness, education, crisis intervention, and financial stability).

Checklist

Your board should be based in East Texas, although they do not have to reside in Smith County.

Your program should be unique to the area without duplicating services. The program goal should be feasible to meet in our area.

There should be data supporting your program's need and how it benefits the community.

Your program should have been in place for at least one year and have a budget showing community support.

Show that your program provides results per dollar spent and that staff meet requirements to remain on board.

A CPA should review your budget. If your agency's total receipts are more than \$250,000, you will need to be able to provide a complete audit and a manager's letter. If your agency's total receipts are less than \$250,000, you will need to be able to provide a letter of review by a CPA.

Your agency needs to work with other agencies, be able to name the agencies, and how you work in cooperation or consultation together.

Your agency must comply with all federal and state laws regarding discrimination.

Your agency must be a recognized 501(c)3.

Your agency must have IRS status making gifts tax deductible.

Your agency meets a need in the community, which is a priority.

Other Notes

The application will time out if left for more than 20-30 minutes, be prepared to complete it in one sitting.

Documents are not required at the time of the first application but will be needed for the October complete application.

If you do not meet the requirements now but will in the future, wait to submit your application.

A United Way representative will reach out if there are any questions.

Official acceptance of applications will not occur until the time for the complete application in October, but you will receive updates from United Way staff on the status.