

Frequent Asked Questions (FAQ) of the 2016 Community Investment Process

1. How do I name my files?

All attached files should have the agency/organization name in the file name with title of document.

Examples: Agency XYZ FY2013 990, Agency XYZ Strategic Plan

2. Do we have to submit electronically?

Yes – you must use the new submission process on the Roane County United Way site under Community Investment. We advise having all of your files that you are submitting in one location on your computer so that you can select all of them at one time and submit.

Organizations may create an electronic version of a document by scanning the document into a portable document format (pdf). The UPS Store, All-Star Promotions, and printing shops/services offer scanning services to convert a hardcopy document to electronic. Another non-profit, such as a church may also have this capability and may assist with this effort.

3. Is the application a PDF form?

Not at this time. It has been tested on Apple and Windows computers.

4. Are we going to review applications or is November 30th the final?

We will not be reviewing applications this year. If you have questions prior to submitting your application please reach out to Dina Jackson at Roane County United Way.

5. Can agencies that receive Community Investment grant also apply for Community Enhancement grant?

Yes – the community enhancement grants will be offered throughout the year beginning in January. Please refer back to our website in January for criteria.

6. Can we use success stories that relate to another county?

Yes – the success story is about the service you are requested funds for and doesn't have to relate to a specific county; however, please note which county is being referenced if not Roane County. We would like to know of the successes you have in Roane County as well.

7. Will there be an interview?

At this time, we are going to require an interview for all agencies that apply for funding. Dates will be determined and communicated at a later time but will take place in 1st quarter 2016.

8. Can I provide additional information on the application?

A fillable space has been provided to allow the applicant to provide additional, supporting information for each question.

9. Can I submit a video about our organization?

Yes – if for some reason it doesn't upload please email it to unitedwayroanecounty@gmail.com.

10. Who do I reach out to with questions?

Dina Jackson, Executive Director at 882.7711

11. May I submit hard-copy materials in support of the application?

Yes, materials and/or references may be provided at the panel interview.

12. I'm not sure if the service my organization delivers fits into one of the foundation areas of education, financial stability, or health. How do I determine which is the best fit?

Some research on your part may assist with your determination. The resource provided on the RCUW website under the link Community Investment entitled "Charting the Course for Change" may be of assistance. You might also review information provided on the RCUW website, <http://unitedwayroane.org/>. **It should be your determination on how the service supports the RCUW mission:**

MISSION STATEMENT	VISION STATEMENT	SERVICE MODEL
<i>RCUW mobilizes the caring power of our community</i> <ul style="list-style-type: none">• To create long-lasting change that improves people's lives, and• To provide for the basic human needs of those needing assistance.	<i>RCUW will be the organization the community turns to when seeking lasting community change. We will be recognized as a catalyst for making a significant and measurable difference in our community. We will mobilize and enable partner agencies to achieve our mission and will be nationally recognized as a leading rural United Way in the area of community outreach.</i>	<i>We will encourage and assist partner service providers, as well as other community service providers, in employing a Linking Relief, Rehabilitation, and Development (LRRD) service model in providing services to Roane County residents. The LRRD service model seeks to provide emergency relief while focusing on offering service recipients a pathway to self-sustainability.</i>

Continued..

13. Can my organization submit the 990-N information for exempt organizations?

Yes, the completed form 990-N is acceptable. If you don't have a copy of the form you can access the information from the [irs.gov](https://www.irs.gov/Charities-&Non-Profits/Exempt-Organizations-Select-Check) website and attach a copy of that with your application.

Link: <https://www.irs.gov/Charities-&Non-Profits/Exempt-Organizations-Select-Check>

Per the IRS: "Most small tax-exempt organizations whose annual gross receipts are normally \$50,000 or less are required to electronically submit Form 990-N, also known as the *e-Postcard*, unless they choose to file a complete Form 990 or Form 990-EZ instead."

The last three years of 990s (2012-2014 years) are required in addition to the financial documents.

14. What should I submit if my organization does not have all of the financial documents requested?

Submit copies of the annual financial documents that you utilized during the last three years to manage the finances of your organization and provide commentary on how you use this information to manage finances. RCUW recognizes that some small nonprofits partner with other organizations and do not utilize formal account documents. RCUW also recognizes that some small nonprofits have simple budgets and manage cash flow on an annual basis. The goal is to be able to demonstrate a level of good managerial and financial stewardship that is appropriate for your organization.

15. If my organization becomes a partner with RCUW, are there fundraising restrictions?

Yes. And those are provided within the mutually agreed upon *Community Partner Agreement*, which provides for the following:

- An organization will not conduct fundraising or other activities that interfere or compete with those of the partnership. This means specifically:
 - The Community Partner will not conduct payroll deduction fundraising campaigns outside of its own organization at any time of the year.
 - Corporate solicitations by the Community Partner will not be made during the annual RCUW campaign period of September 1 – November 30.
 - The Community Partner will notify the RCUW of its intended fundraising activities in its annual application. This information will be used to communicate among agencies when fundraising activities may be competitive in nature.

16. To receive funds designated by donors to a specific organization does the organization need to complete the Community Investment application?

Yes, to receive designated funds, an organization must apply and be approved to receive RCUW funds. To learn more about designations options, go to <http://unitedwayroane.org/?s=designation>. It is RCUW's responsibility to our investors/donors to assure their contribution goes to a legitimate nonprofit which affects whether or not their donation is tax deductible and to assure the

organization meets at least the following criteria, (criteria was based on the following references found at websites <http://www.tn.gov/attorneygeneral/>; <http://www.tennessee.gov/sos>; <http://www.irs.gov/charities/index.html>; <http://www2.guidestar.org>):

- Current, confirmed nonprofit operating in the State of Tennessee (Tennessee law requires nonprofit organizations to use their assets to fulfill their charitable purposes and not for the benefit of private parties);
- Fiscally managed and financially solvent;
- Has the capacity and resources to deliver services needed by Roane Countians; and
- Is in compliance with the spirit and intent of the USA PATRIOT Act and other counterterrorism laws