



**LIVE UNITED**

**Roane County United Way**

Mailing: PO Box 317 Harriman, TN 37748

Office Location: 431 Devonia St., Harriman, TN 37748

[www.unitedwayroane.org](http://www.unitedwayroane.org)

865.882.7711

**Community Investment Partner Application Instructions and Check-List**

**Application Deadline: December 14, 2018 by 5:00 pm**

Roane County United Way’s (RCUW) goal is to help more members of our community achieve: healthier lifestyles; enhanced levels of education and job qualification; and financial stability. All applications must relate to health, education and job qualification, or financial stability areas.

An organization will **NOT** be considered for funding if they do not:

- Meet the qualifications described in *Process Description and Rating Criteria*, <http://unitedwayroane.org/application-for-funding/>; or
- Submit a full, completed application package on time. If the organization is unable to submit requested documents; the organization should include an explanation as to why it is unable to submit the documents in the space at the end of the application “Please provide additional comments related to your application you feel is important for the Community Investment Committee”; or
- The application package is received after the application deadline of December 14th, 5:00 p.m.

APPLICANTS MUST USE THE FILLABLE APPLICATION FORM, located at <http://unitedwayroane.org/application-for-funding/>.

**All attached files should have the organization name in the file name with title of document! Examples provided below.**

Submit all of the following items.

<b>Application</b>	<input type="checkbox"/> Submit a signed copy (electronic only) File name should include organization name and Application (Example: Agency XYZ Application)
<b>Attachments</b>	<input type="checkbox"/> State of TN Charitable Letter (Proof of Registration or Exemption)
<i>Include this completed checklist</i>	<input type="checkbox"/> IRS Tax determination letter (tax exempt status of the nonprofit)
<p><b>All attached files should have the organization name in the file name with title of document!</b></p> <p><u>Examples</u></p> <p><b>RCHELPSPEOPLEINNEED FY2015 990</b></p> <p><b>RCHELPSPEOPLE Strategic Plan</b></p> <p><b>(A shortened organization title is acceptable and/or recognizable acronym such as MECAA or SCHAS)</b></p>	<input type="checkbox"/> Most recent completed audit. If your organization is an audited federal and/or state government entity, the Financial Review Panel may elect to deem the audit review as satisfactorily completed without reviewing the audit.
	<input type="checkbox"/> 3 years of 990’s (if gross receipts >\$50,000) and annual budgets (Include comments on significant items)
	<input type="checkbox"/> 3 years of financial information – Audited Profit and Loss Statement, Balance Sheet and Cash Flow Statement, Annual Budgets (Please make comments on significant items)
	<input type="checkbox"/> 25-word statement describing your organization
	<input type="checkbox"/> Strategic Plan – <b>Required</b> for total fund request of \$5,000 or above for the organization. If you are requesting less than \$5,000, you may do either, include: <ul style="list-style-type: none"> <li>• Your organization’s DATED strategic plan or</li> <li>• A short statement (one page maximum) about the strategic direction of your organization.</li> </ul>
	<input type="checkbox"/> List of current Board of Directors
	<input type="checkbox"/> Board Meeting Minutes (3 most recent held meetings)

**Submitting Application and attachments:** [www.unitedwayroane.org](http://www.unitedwayroane.org) **Community Investment– under Submit Application**

**Questions:** Contact Corinne Shaw, Community Impact Coordinator or Dina Jackson, Executive Director Phone: 865.882.7711

email: [cshaw@unitedwayroane.org](mailto:cshaw@unitedwayroane.org) or [djackson@unitedwayroane.org](mailto:djackson@unitedwayroane.org)