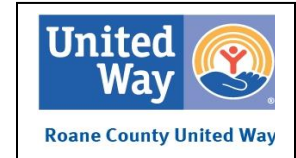


**Roane County United Way (RCUW)
Checklist for Community Investment Grants
Application Deadline: January 21, 2023 by 5:00 p.m.**



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

- Meet the qualifications described below and in *Process Description and Rating Criteria*, <https://unitedwayroane.org/online-ci-application/>
- Submit a full, completed application form as requested, or
- Application package is received after the application deadline of January 21, 2023, by 5:00 p.m.

Requirements:

- Current registration as a Charitable Organization with the Tennessee Secretary of State or has a current exemption
- Program being considered is either in or serves Roane County, TN
- Tax-Exempt Status under section 501(c)3 of Internal Revenue Code or has a fiscal sponsor that is
- Board of Directors meets regularly as directed by the IRS and organization's bylaws
- Organizations must have an independent audit, review, or compilation, or letter explaining why not, based on the following annual revenue ranges:
 - >\$1 million: Independent audit
 - \$250,000-\$1 million: Independent audit, review, or compilation
 - <\$250,000: no audit or review needed
- Programs support RCUW's mission: Health, Education, or Financial Stability
- Capacity to report measurable, qualitative, and quantitative outcomes
- Adhere to Partnership Agreement and outcome report deadlines
- Funding does not extend to individuals, fundraising, capital campaigns, endowments, sponsorships, marketing opportunities, or sports events
- Agency must be in existence for at least 3 years or associated with or a member of one that has been

Applicants must use the fillable application form <https://form.jotform.com/213155965321050>

Application

Submit a signed copy (electronic only)

Attachments Needed

- State of Tennessee Charitable Letter (Proof of Registration or Exemption)
- IRS Tax 501(c)3 Letter
- Most Recent Audit
- List of Current Board of Directors
- Board Meeting Minutes (3 most recently held meetings)
- 3 years of 990's if gross receipts are greater than \$50,000 and funding request is greater than \$10,000. (Only 1 year is required if request is less than \$10,000.)
- 3 years of financial information - Audited Profit and Loss Statement, Balance Sheet and Cash Flow Statement, Annual Budgets if funding request is greater than \$10,000. (Only 1 year is required if funding request is less than \$10,000.)
- Signed Counter Terrorism Agreement

Submit Application and attachments by email to: sleavell@unitedwayroane.org

Questions: Contact Sandy Leavell, Executive Director, at 865-882-7711 or email sleavell@unitedwayroane.org