

**Roane County United Way (RCUW)  
Checklist for Community Investment Grants  
Application Deadline: February 17, 2025 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 February 17, 2025 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: Healthy Community, Youth Opportunities, Financial Security and Community Resiliency.
- 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](mailto:sleavell@unitedwayroane.org)

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