



**Roane County United Way (RCUW)**  
**Checklist for Community Investment Grant Application**  
**Deadline: March 1, 2026 by 11:59 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 March 1, 2026, 11:59 pm.

**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)