

Thank you for your interest in receiving funding from the United Way of Winneshiek County. April 15, 2019 is the deadline to submit the Application for 2020 distributions for United Way of Winneshiek County funds. Please provide detailed and complete information to the requested information within the application.

As a Board of Director subcommittee, the Allocations Committee strives to make continuous improvements to our allocation process. One improvement initiated in this year's process is the development of a scoring rubric. Many factors weigh into the scoring of applications. Items reviewed will include a demonstration of need, community support, community impact, and strength of the organization. This year's applications will be scored on the following criteria:

- **Organization Mission**– Does the agency mission and goals align with the mission and goals of the United Way of Winneshiek County?
- **Sustainability** – The probability the agency will be successful with or without United Way of Winneshiek County funds.
- **County Focus** – The need for the program within Winneshiek County and how the proposed outcomes will impact the county.
- **Funding Details** – Strength and specificity of information provided describing funding request.
- **Technical** – Is submitted application on time and complete?

Please note that the funds being applied for with this application are distributed beginning January 2020 and are disbursed quarterly throughout the calendar year.

Submit the completed application form along with any necessary attachments to the United Way of Winneshiek County's Allocation Committee at PO Box 165, Decorah, IA 52101 or email to unitedwaywincco@gmail.com no later than **4 pm** on **April 15, 2019**. Electronic submissions are accepted and encouraged.

UNITED WAY OF WINNESHIEK COUNTY

Application for Financial Allocation 2020

Agency: _____

Phone: _____

Address: _____

Email: _____

Executive Director: _____

United Way Representative (include name & email if different person than above):

2019 Agency Total Budget: \$ _____ 2020 United Way Request: \$ _____

How many years has your agency been in existence? _____

Mission of your agency:

How would these United Way of Winneshiek County funds be used? Mark one:

- Program Overhead Expense Employee/Volunteer Training Other
(Salaries, mileage, supplies, etc)

In detailed narrative, discuss how the funds would be used. Be as specific as possible. Attach quotes and additional sheets as needed.

Explain agency fund-raising events that have occurred in the past 2 years and events you are considering for the coming year. Fund-raising events that are scheduled during the United Way Campaign require permission of the United Way of Winneshiek Co Board of Directors.

Are the below numbers reflective of Agency or Program numbers? Mark one.

PERSONS SERVED	Actual in 2018	Expected in 2019	Proposed 2020
in Winneshiek County:			
Other persons served:			
STAFFING	Actual in 2018	Expected in 2019	Proposed 2020
Professional/Management			
Support/Clerical			
Volunteer Staff			

Paid staff turnover ratio _____ / _____

Are the below numbers reflective of Agency or Program numbers? Mark one.

REVENUE	Actual in 2018	Expected in 2019	Proposed 2020
United Way of Winneshiek Co			
Other United Ways			
Foundations & Private Grants			
Contributions-General			
Government			
Fundraising & Special Events			
Program Service Fees			
Investment Income			
Miscellaneous Revenue*			
TOTAL REVENUE			

*If the Miscellaneous Revenue is large-please attach a form showing the break down

EXPENSES	Actual in 2018	Expected in 2019	Proposed 2020
Salaries, Benefits & Payroll Taxes			
Program Supplies & Equipment			
Occupancy & Utilities			
Travel & Vehicles			
Specific Assistance to Individuals			
Organization Dues			
Miscellaneous Expense			
TOTAL EXPENSES			

Attach a form to explain unusual expenses and significant variances from year to year.

ATTESTATION: Board Chairperson or Executive Director must initial 1 – 7 below to attest.

1. _____ The agency certifies that United Way funds will be used for stated purposes.
2. _____ The agency has 501 (c) 3 status with the IRS. **Attach.**
3. _____ The agency will actively participate in the annual United Way campaign from August through October.
4. _____ The agency will actively contribute to fund-raising efforts by contributing either a golf sponsorship or team at the annual golf outing AND participate in at least 1 event during the year.
5. _____ An agency representative will attend the required meetings on July 18, September 19, October 17 and November 21, 2019.
6. _____ The agency will conduct no benefit campaigns, or solicitations for financial assistance for ordinary purposes during the months of the official United Way campaign, except with prior consent obtained from the Board of Directors.
7. _____ The agency will keep comprehensive and accurate financial records.
8. _____ Funds provided by the United Way of Winneshiek County will only be used in Winneshiek County.

By signing, I agree to meet the expectations of the United Way of Winneshiek County Board. If expectations are not met, I understand my funding could be decreased by up to 25%.

Printed name and Title of Board Chairperson or Executive Director

Signature of Board Chair or Executive Director

Date

For publicity purposes, please attach a brief description of the services provided by your program. Include a 2 or 3 sentence impact statement about how your United Way allocation will benefit others in Winneshiek County. This information will be used in preparing a United Way brochure and other campaign activities.

NOTE: The funds that you are applying for through the United Way of Winneshiek County application process are for the 2019-2020 campaign year. Distributions begin in January 2020 and are disbursed quarterly throughout the calendar year. Each request is looked at annually and depending on our community needs your allotment may change from year to year. There is no guarantee that the funds that you have been approved for in the past will continue in each new United Way of Winneshiek County year.

Applications must be received by United Way of Winneshiek County's Allocation Committee, PO Box 165, Decorah, IA 52101 or unitedwaywinnco@gmail.com no later than **4 PM** on **April 15, 2019.** Electronic submissions are accepted and encouraged.