

UNITED WAY OF WINNESHIEK COUNTY

Application for Financial Allocation 2023

Our Mission: To enrich lives in the Winneshiek County area by providing leadership, advocacy and resources.

Thank you for your interest in receiving funding from the United Way of Winneshiek County. The deadline to submit the application for 2023 distributions for United Way of Winneshiek County funds is September 15, 2022. Please provide detailed and complete answers to the requested information within the application.

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?

Refer to the Obligations of Participation section from the United Way By-Laws as found on our website under the Funding Application Tab.

Please note that the funds being applied for with this application are distributed beginning January 2023 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 **unitedwaywinnco@gmail.com** no later than **4 pm** on **September 15, 2022**. Electronic submissions are accepted and encouraged.

Agency: _____

Phone: _____

Address: _____

Email: _____

Executive Director: _____

United Way Representative: _____

2022 Agency Total Budget: \$ _____ 2023 United Way Request: \$ _____

How many years has your agency been in existence? _____ (By-laws require minimum of 3 years)

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

Explain agency fundraising events that have occurred in the past 2 years and events you are considering for the coming year.

Fundraising events that are scheduled in Winneshiek County during the United Way Campaign require permission of the United Way of Winneshiek Co Board of Directors. List below any events the United Way board needs to be made aware of that occur during the United Way campaign (March - April 2023 note new timeline for campaign).

For publicity purposes, please provide a brief description of the services provided by your program. Include an 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.

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

PERSONS SERVED	Actual in 2021	Expected in 2022	Proposed 2023
in Winneshiek County:			
Other persons served:			
STAFFING	Actual in 2021	Expected in 2022	Proposed 2023
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 2021	Expected in 2022	Proposed 2023
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 2021	Expected in 2022	Proposed 2023
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 – 9 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.** Applications without this document will be considered incomplete.
3. _____ The agency will actively participate in the annual United Way campaign March & April 2023.
4. _____ The agency will actively recruit or contribute to the golf outing by either finding a golf team or a hole sponsor.
5. _____ The agency will work at least 1 event (appreciation pancake breakfast, golf outing, winery run or holiday lights).
6. _____ The agency will sell a minimum of 25 raffle tickets for the drawing in October.
7. _____ An agency representative will attend **ALL** the required meetings on Feb 16, May 18, August 17 & October 19 2023.
8. _____ The agency will not conduct special fund raising events in Winneshiek County during the months of the official United Way campaign, except with prior consent obtained from the Board of Directors. (Refer to question on page 2 asking to list such events).
9. _____ The agency will keep comprehensive and accurate financial records.
10. _____ 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

United Way 2023 Calendar

January	February	March	April	May	June
	<ul style="list-style-type: none"> - Required Board Meeting for Agencies - Prepare for campaign 	<ul style="list-style-type: none"> - Campaign Starts - Send out letters to individuals & small businesses - Sign up for businesses to contact 	<ul style="list-style-type: none"> - Campaign Continues - Reach out to businesses 	<ul style="list-style-type: none"> - Required Board Meeting for Agencies - Final details for Appreciation Breakfast 	<ul style="list-style-type: none"> -Appreciation Breakfast first Sunday of the month
July	August	September	October	November	December
<ul style="list-style-type: none"> - Begin collecting items for raffle & golf prizes -Winery Run Event 	<ul style="list-style-type: none"> - Required Board Meeting for Agencies - Hand out raffle tickets - Golf Outing (2nd Thursday) 		<ul style="list-style-type: none"> - Required Board Meeting for Agencies - Draw raffle winners - vote on recognition 	<ul style="list-style-type: none"> Holiday Lights Event 	