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2010-2011 Packet for Participation and Funds

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Helping to Build a Caring Community



United Way of Eastern Oregon

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Forms Attached

- [1](#) Application Form
- [2](#) Budget Form
- [3](#) Agency Agreement

United Way of Eastern Oregon

I. Introduction

United Way of Eastern Oregon is an autonomous non-profit organization dedicated to helping the residents of Union & Baker Counties. Through community-wide campaigns, volunteers raise funds to support non-profit Union & Baker County agencies that provide human health and welfare services and valuable community programs.

In this packet are the materials needed to apply for Union and Baker County based program funding from United Way of Eastern Oregon. The enclosed information will help guide you through the application process.

If you have any questions, please contact our Executive Director, Dawn Roe, at (541) 962-0306 or uweo@eoni.com. She is available to help you at any point in the funding process.

Please submit the completed application **and the required amount of copies**, each complete with all requested attachments, either postmarked by **March 26, 2010** or delivered to the office by 5:00pm on that same day, **March 26, 2010**. If applications are mailed, use the mailing address: United Way of Eastern Oregon, PO Box 862, La Grande, OR 97850. Applications to be delivered should be brought to: 61988 Cottonwood Road, La Grande, OR 97850.

One copy of the submitted applications must contain the **original signature**. All applications and attachments need to be punched along the left side with a standard **three-hole punch**.

United Way of Eastern Oregon's 2010-2011 budget hearings (agency interviews) are scheduled for **April 15 & 16, 2010, in La Grande, OR**. Please call our office by March 26, 2010, to schedule your appointment. If your application is received without a previously scheduled interview appointment, one will be assigned to you. A list of scheduled appointments will be sent to all applying agencies after March 31, 2010.

II. Eligibility

For the March 26, 2010 application period, an agency must meet the following criteria to be eligible for funding from United Way of Eastern Oregon. The agency must remain in compliance with the criteria at all times.

- ◆ Be incorporated or chartered under Federal and Oregon State statutes.
- ◆ Be recognized by the Internal Revenue Service as tax-exempt under 26 U.S.C. 501(c)(3) and to which contributions are tax deductible pursuant to 26 U.S.C. 170.
- ◆ Agency program(s) and services must be health or human services related and directly serve Union or Baker County residents.
- ◆ Maintain accounts for its funds in accordance with generally accepted accounting principals (GAAP.)
- ◆ Comply with all applicable federal, state, and local laws. All licenses necessary to provide the agency's programs and services are valid and in good standing.
- ◆ Demonstrate adequate understanding of community needs and services currently provided in Union or Baker County.
- ◆ A volunteer Board of Directors governs the agency. The Board is responsible for all areas of the agency's operation and it is the policy-making and resource allocating entity of the organization. The Board serves without compensation and no voting member of the Board is a staff member of the agency. The Board monitors compliance with the agency's mission statement and by-laws.
- ◆ Demonstrates need for United Way funding.

Eligibility for funding will be established by the United Way Eastern Oregon's Budget Committee based on a comprehensive review of financial, program and operating conditions of the applicant agency and the need for the type of program(s) the agency is providing in Union or Baker County. This comprehensive review will take place upon submittal of the organization's application and subsequent interviews. All agency affiliations are subject to final approval by the United Way of Eastern Oregon Board of Directors.

III. Application Instructions

1. Complete the **application** and **narrative** using a typewriter or computer. Copies in Microsoft Word format are available from our office or may be downloaded at www.eoni.com/uweo
2. If United Way of Eastern Oregon currently funds your agency, complete the 2009 **program report** listed in the application.
3. Read and sign the **Agency Agreement**.
4. Provide the required **attachments** listed on the application form. Please number attachments with the corresponding item number.
5. Sign the application.
6. The following number of copies are required so each member of the United Way of Eastern Oregon Budget Committee has the necessary information:
 - For Union County applications: make eleven (11) copies complete with all attachments, **twelve (12) total**. Be sure to include the application and agreement with the original signature.
 - For Baker County applications: make five (5) copies complete with all attachments, **six (6) total**. Be sure to include the application and agreement with the original signature.
 - If applying to both counties: make eleven (11) copies complete with all attachments, **twelve (12) total**. Be sure to include the application and agreement with the original signature.
 - Only one copy need be submitted of agency IRS 501 (c) (3) determination letter, agency IRS 990, and agency audit if required.
7. **Punch all submitted materials along the left side with a standard three-hole punch.**

IV. Financial Information

There is a standardized budget form attached with the application packet. You can use your own format if preferred but confine your financial information to one page that includes the requested fiscal information.

You will need to attach a copy of your financial information to each of your application copies. The information we need applies to your fiscal year; a fiscal year is typically the calendar year or the twelve-month period between July 1 and June 30. Identify and use the fiscal year that applies to your agency.

- ◆ Last Fiscal Year – A line-item budget showing the agency’s actual income and expenses for your last completed fiscal year. Fill in the column heading with the appropriate year. Example: “Year Ending 2009.”
- ◆ This Fiscal Year – A line-item budget showing the budgeted income and expenses for your agency’s current fiscal year. Fill in the column heading with the appropriate year. Example: “Year Ending 2010.”
- ◆ Proposed Next Year – A line-item budget showing the projected agency’s income and expenses covered by this application request. Agencies accepted for funding will be included in this year’s Annual Fall Campaign with funds being disbursed the following February, August, and February of the following year. Example: Fall 2010 Campaign with disbursements in February 2011, August 2011, and February 2012.
- ◆ Planned Use of United Way Funds – A line-item budget of how you plan to use the funds requested in this application.

Depending on your request, you may have to attach one to four budget forms containing the pertinent fiscal information. If your agency covers more than one county, you will need to submit one budget form for your agency’s total income and expenses, and one budget form separating your agency’s income and expenses directly attributable to your Union County services and/or Baker County services. If your request is for a specific program, you will need to submit one budget form for your agency’s total income and expenses, and one budget form for the proposed program.

Example: If your request is for general operating support and your agency only provides services in one county, you will only need to submit **one** budget form.

V. Budget Form Line-Item Explanations

Revenue

Federal - Federal dollars received.

State - State dollars received.

County - County dollars received.

Foundations & Grants - Revenue received specifically from a foundation or other private grant source.

Fundraising & Contributions - Includes amounts received from special events, individual donors, corporations or businesses, trusts, bequests, or membership dues from individuals or organizations. May also include revenue resulting from the sale of an item.

United Way of Eastern Oregon - Financial support requested and/or received.

Other United Way funding - Financial support from United Ways in other counties.

Program Service Fees - Fees paid by clients to participate in a program or to receive a program's services.

Investment Income - Revenue available for operations, derived from bank accounts, CD's, trusts, bequests, bonds and other investments.

Other Revenue - Very little should usually remain to be shown as Other Revenue. Detail significant revenue sources on the lines provided.

Expenses and Cash Disbursements

Direct Program Costs - Specific assistance to individuals – the cost of assistance or services for a particular client such as food, shelter, clothing, camp sponsorships, etc.

Salaries - Salaries and wages for regular employees (full or part-time), temporary employees, including office temporaries, other than consultants and others engaged on an individual basis.

Payroll Taxes - Social Security/Medicare taxes, workers' compensation insurance premiums, or unemployment expenses or other expenses payable by employers under federal, state, or local laws.

Employee Benefits - Health, Dental, Life, Disability and other insurance as well as retirement benefit plans.

Professional Fees - Fees and expenses of professional practitioners and consultants who are not employees of the reporting agency and are engaged as independent contractors for specified services on a fee or other individual contract basis.

Occupancy - The cost of occupying the building such as rent, utilities (includes bills for gas, water, electricity, and telephone), maintenance, and insurance which is not for employee benefits or related to payroll.

Travel/Transportation - Costs of program and administrative travel for staff and volunteers. Also include expenses related to conferences and staff development.

Office Expenses - Represents the costs of running the office, including supplies, copies, printing, data processing, etc. Please include the cost of renting and maintaining equipment such as computers, copiers, etc.

Membership Fees & Dues - Amounts paid for bona fide membership in other organizations that provide benefits such as regular services, publications, materials, etc.

Payments to Affiliates - Dues to statewide or national organization.

Major Property & Equipment Acquisition - Property and/or equipment acquisitions of more than \$1,000.

Other Expenses - Represents all other expenses not detailed above. Detail the significant expenses on the lines provided.

VI. UWEO Diversity Policy Statement

Underlying the role and mission of the United Way of Eastern Oregon is a firm belief in the dignity of all people. We reaffirm this belief in our policies, which guide and direct our employment practices, program funding, volunteer recruitment, and service delivery.

Diversity, as defined by United Way of Eastern Oregon, provides equal opportunity to all people without regard to race, creed, color, religion, marital status, sexual orientation, disability, sex, age, or national origin. United Way promotes the full realization of this policy through the positive recognition of the value of diversity.

Diversity and Employment:

United Way of Eastern Oregon is fully committed to assuring equal opportunity and equal consideration to all qualified applicants and employees in personnel matters including recruitment, hiring, training, promotions, salaries and other compensation, transfer and layoff or termination.

In the implementation of this policy, United Way will aggressively seek personnel for all job levels within the organization without regard to race, creed, color, religion, marital status, sexual orientation, disability, sex, age, or national origin. The intent of this policy is to reflect the positive value of diversity in the community.

Diversity and Program Funding:

United Way of Eastern Oregon is fully committed to the funding of programs that provide equal opportunity and access for all, without regard to race, creed, color, religion, marital status, sexual orientation, disability, sex, age, or national origin. In the implementation of this policy, United Way will continue to provide funding to programs that target underserved populations as identified through continuous community assessment. The intent of this policy is to provide funding to meet the needs of, and support the diversity of our community.

Diversity and Volunteer Recruitment:

United Way of Eastern Oregon is fully committed to the recruitment of volunteers to fill all volunteer positions within the organization without regard to race, creed, color, religion, marital status, sexual orientation, disability, sex, age, or national origin.

In the implementation of this policy, United Way will aggressively seek volunteers from the community who reflect and acknowledge the value of diversity, including, but not limited to minority group members, women, and the disabled.

Diversity and Service Delivery:

United Way of Eastern Oregon is fully committed to the delivery and provision of service to meet the needs of the community as identified through a continuous assessment process. In the implementation of this policy, United Way will grant program funding to those organizations which demonstrate the commitment to provide service without regard to race, creed, color, religion, marital status, sexual orientation, disability, sex, age, or national origin or which have as their legitimate stated purpose or mission the servicing of specific population segments.

Responsibility:

In order to promote and value diversity, the active participation and support of all members of the organization is required.