



UNITED WAY OF VAL VERDE COUNTY 2018-2019 APPLICATION INSTRUCTIONS AND CHECKLIST
SUBMISSION DEADLINE: 5:00 p.m., Monday, April 23, 2018.

Please submit **eight collated copies (no folders, binders, or staples- just clips, please)** of the following:

- Original Letter of Agreement** (only 1 copy needed) signed and dated by organization president and director- include this Original on the top of the application documents.
- 2018 Campaign Allocation Application Form**
- Formal Request for Funding:** 2-3 pages only that provide the following items together:
 1. Brief history of organization and statement of need for organization's services in Val Verde County; provide supporting demographics. (One paragraph should be able to cover this section);
 2. Description of the purpose for the requested funds and how that purpose will improve the education, income, and/or health of Val Verde County's population; include any special projects planned for 2018/2019;
 3. A statement that the agency will assist United Way by designating two volunteers to help solicit funds during the Fall Campaign. (Last campaign's participation will be considered during the allocation process);
 4. Two specific success stories that demonstrate the impact past UW funds have made on the lives of community members- education, income, health- through your organization during 2017, if applicable;
 5. Financial accountability audit/statement (or audit) must be clearly stated based upon the amount of Total Revenue as shown on submitted IRS Form 990 or Pro Forma 990;
 - Over \$250,000-must provide a copy of annual audit that matches the fiscal period of submitted IRS Form 990; must include accountability on accrual basis statement.
 - \$100,000-\$249,999- must provide statement that organization accounts for its funds on an accrual basis in accordance with generally accepted accounting principles (GAAP).
 - Less than \$100,000- must provide statement that organization has controls in place to ensure funds are properly accounted for and can provide accurate timely financial information to interested parties.
- List of Officers and Board of Directors- with contact information**
- Composite Budget Form-** Form in package must be contain Last Year's Actual Balance Sheet; Current Fiscal Year Budget; Current Fiscal Year-to-Date; Next Fiscal Year's Proposed Budget. This should cover organization expenses that will be incurred specifically for Val Verde County activities.
- APPLICABLE pages of IRS Form 990 or Pro Forma 990** covering a fiscal year ending 30 Jun 2015 or later. Note: 990EZ, 990PF, and comparable forms are not acceptable substitutes. (see IRS 990 and Pro Forma 990 Instructions). Please see IRS instructions for page numbers and further instructions.
- Most recent confirmation of submission of IRS Form 990-EZ or 990-N** (if not submitting 990)
- IRS Letter of Determination** for 501(c)(3) Federal Tax Exemption status- provide a copy of the most recent letter

Please send all documents to:

United Way of Val Verde County
P.O. Box 1034
Del Rio, TX 78841-1034

If you have questions, need help, or if you want to hand deliver the application, please contact Robyn via email at admin@uwvalverde.org, phone: (830)774-0704, or text:(808) 854-7487.

