



Chatham County Government and United Way of Chatham County
2019/2020 Funding Application



Required Certification Documents

Whether you are requesting funding from United Way, Chatham County or both, all of the following items must be uploaded to the online application by February 28, 2019.

If a certification attachment cannot be submitted by the application due date, please upload an explanation as to why on letterhead and signed by the director. A projected date for submission of the required document must be included. This letter of explanation should be uploaded in place of the missing item.

C-1a. Annual Audit or Financial Statement Review

An audit is required by both Chatham County and United Way for agencies with annual revenue of \$300,000 and over. For agencies with annual revenue of less than \$300,000, a financial review by an independent CPA is required. For agencies with annual revenue of less than \$50,000, a financial analysis will be administered by staff.

C-1b. Management Letter (if applicable)

C-1c. Management Response (if applicable)

C-2 Annual Line Item Budgets – List all revenue and expenses for the prior year actual, current year budget, current year estimated and next year requested using the required budget template. Project year-end totals for “current year estimated.” Provide an explanation for any variance between the last two years of more than 10%. Chatham County and United Way require your budget to balance which means that total revenue and expenses should equal each other.

C-3 NC Solicitation License or Letter of Exemption

C-4 IRS Form 990 (most recent filed)

C-5 Board Roster with Names, Addresses and Professional and/or Community Affiliations

C-6 Organizational Chart of the Agency (by position and number of hours worked per week)

C-7 Code of Ethics or Conflict of Interest Policy

The following items should only be submitted if the agency is applying for the first time or if their Board has revised them since December 31, 2016.

C-8 Financial Reserves Policy

C-9 IRS 501(c)3 Letter of Tax Exemption

C-10 Written Non-Discrimination Policy related to Clients, Board and Staff that meets Federal Guidelines or a written statement on a mission-based reason why this standard cannot be met.

C-11 Articles of Incorporation

C-12 By-Laws