


**United Way of Chatham County
Funding Application Process**

Welcome to the United Way 2021/2022 Funding Application Webinar

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**United Way of Chatham County
Funding Application Process**

United Way's funding process is focused on meeting the human and social service needs of the community by providing financial support to eligible nonprofit agencies.

This year's application process is open to all nonprofits providing human services to Chatham residents.

The following is an overview of the new funding application process.

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**United Way of Chatham County
Funding Application Process**

We will review

- **Funding Focus Areas**
- **Application Process Timeline**
- **Certification Section of Application (LOI)**
- **Certification Required Documents**
- **Program Request Section of Application**
- **Donor Evaluation**
- **Funding Notification & Agency Agreement**


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**United Way of Chatham County
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United Way's **Community Investment Priorities** are based on the results of the Chatham County Community Assessment, conducted by the Chatham County Health Alliance in 2018.

The full report can be reviewed on the United Way website at: unitedwayofchathamcounty.org/community-needs-assessment/


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**United Way of Chatham County
Funding Application Process**

Community Impact Focus Areas

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**United Way of Chatham County
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Community Impact Focus Areas

The United Way Board of Directors has also defined its goals, objectives and performance measures for each one of these funding priorities.

We will review them thoroughly when we take a look at the program request section of the application.

All human service nonprofits that address one of these community impact priorities are invited to apply for funding. Applicants must describe how their program will fulfill United Way's investment goals and objectives.

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Application Process Timeline

The application will be accessible immediately following this meeting. It can be accessed from the United Way website at UnitedWayofChathamCounty.org.

Existing Users: Please enter your credentials and log in. If you forgot your password, please use the "Forgot your Password" link to reset your password.

New Users: Please click on "Create New Account" to complete the registration process and create your logon credentials.

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**United Way of Chatham County
Funding Application Process**

Application Login

Only One User Account Per Agency: If the person who created your agency's account last year will not be the primary contact this year, please contact the United Way office to set up the new contact and login info. This can't be done by selecting "Create a New Account" because the accounts are organized by agency.

Staff/Board Input: The application's *Collaborate* function will allow you to email a link to your application to others for review and editing. Their additions and changes will be saved to your application. This can be done at any point during your application completion. This function will be reviewed in detail in a few moments.

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**United Way of Chatham County
Funding Application Process**

Certification Section of Application



**Hard Copies of
Certification Documents
Are Not Required!**

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Certification Section

The Certification Section (LOI) of the application may be submitted anytime between today and **Friday, January 29.**



We must know who is applying in order to create the evaluation schedule. Therefore, the Certification Section (LOI) must be received by the deadline in order to be eligible to be considered for funding.

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Certification Section (LOI)

The Certification Section begins with a very brief "General Information" section.

Questions include contact info, agency summary and the number of staff and volunteers.

The Certification Section should take less than an hour to complete.

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Certification Section (LOI)

- Certification questions have been reduced to 10.
- There are just 8 certification documents for reapplying agencies and 12 for new applicants.
- **The Certification Section (LOI) must be submitted for every program request.** The copy function makes this a quick task. This will be reviewed momentarily.



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Certification Documents

C-1 a: Audit or Financial Review

An audit is required for the last completed fiscal year for agencies with annual revenue of \$500,000 and over.

For agencies with annual revenue of less than \$500,000, a financial review by an independent CPA is required.

For agencies with annual revenue of less than \$100,000, a financial analysis will be administered by United Way staff. It must be completed before January 29.

Be sure to upload the entire document and not just the first page. (The entire Audit & IRS Form 990 is required.)

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Certification Documents

C-1 a: Audit or Financial Review

If your audit, IRS Form 990 or Solicitation License can't be submitted by the application due date of January 29, please upload an explanation as to why on letterhead and signed by the director.

Please include a projected date for when you will have the missing item. The letter of explanation should be uploaded in place of the required document.

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Certification Documents

C-1 a: Audit or Financial Review

First Time Applicants:

If your audit and IRS Form 990 for the last completed fiscal year are not yet available, please submit your most recent documents.

Please be aware that should funding be approved, the audit and IRS Form 990 for the last completed fiscal year must be submitted before funding is disbursed.

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Certification Documents

C-1b. Management Letter and Management Response (if applicable)

A management letter is a letter from your auditor that is required to communicate material weaknesses and significant deficiencies. It also includes an auditor's recommendation for resolution.

The management response letter is written by the agency detailing how they plan to incorporate the auditor's recommendations to resolve any identified issues.

Upload both letters in one PDF. Leave blank if not applicable.

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Certification Documents

- C-2 Current, Board-Approved Agency Operating Budget
- C-3 Most Recent Board-Approved Financials
- C-4 NC Solicitation License or Letter of Exemption
- C-5 IRS Form 990 (most recently filed)
- C-6 Board Roster with Names, Addresses and Professional and/or Community Affiliations
- C-7 Code of Ethics or Conflict of Interest Policy
- C-8 Financial Reserves Policy

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Certification Documents

The following items should only be submitted if your agency is applying for the first time or if your Board has revised them since December 31, 2019.

- C-9 IRS 501(c)(3) Letter of Tax Exemption
- C-10 Non-Discrimination Policy
- C-11 Articles of Incorporation
- C-12 Bylaws

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Certification Section

The sooner you submit the Certification Section (LOI), the more time you will have for the Program Request Section.

You won't have access to the Program Request Section until the Certification Section has been submitted, reviewed and approved.

We expect the turn-around time to be 48 hours; however, if everyone submits it on January 29, this will most likely not be the case.

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Certification Submission Confirmation

Once you submit your Certification Section (LOI) for each program you're requesting to be funded, you will receive a confirmation email that it's been received.

After your submission has been reviewed, you will receive a Certification Status email notifying you that you are:

- Certified
- Eligible To Proceed
- Ineligible to be Considered for Funding

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Certification Status Email

The "Eligible To Proceed" status means that one or more of your certification documents is missing. (This is usually the audit and IRS Form 990 for the most recently completed fiscal year. It could also be a current Solicitation License.)

Should funding be approved, these items must be submitted. Your funding notification email, scheduled for June 4, will provide instructions on how to use the follow-up forms to upload all missing items onto the application website. Do not send them to the United Way office.

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Certification Status Email

Your Certification Status email will also notify you that the program request section is now accessible.

Simply login to your account and it will now be on your dashboard.

To begin the section, select "Edit Application."

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Program Request Section

The Program Request Section must be submitted online by 5:00 Friday, February 26, 2021



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Application Submission Confirmation

Once you submit your Program Request Section for each program you're requesting to be funded, you will receive an email confirming receipt.

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**United Way of Chatham County
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Program Evaluation Meeting (Q&A Session)

You will receive an email on March 5 notifying you of your virtual meeting date with the donor review panel.



Meetings will take place on:

- Wednesday & Thursday, April 21 & 22
- Monday, Wednesday & Thursday
April 26, 28 and 29.

Please keep these dates open.

The meeting with the review panel will be a thirty-minute **Question & Answer Session**. It will begin on the half-hour. All sessions will take place via Zoom.

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Site Visit

Due to continued uncertainty around the COVID-19 situation, site visits are canceled for the 2021/2022 Allocation Process.

It is the sincere hope to resume site visits for the 2022/2023 Allocation Process.

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Program Evaluation Panel

All United Way evaluation panel members will attend a virtual orientation session to review the funding application and evaluation process.

Be prepared for specific questions regarding:

- Program Details
- Performance Indicators
- Allocation Budget
- Program Budget



Please be sure to have a copy of your application with you for your referral during the Q&A Session.

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Program Evaluation

After all Q&A sessions have taken place, the United Way Board of Directors will review the recommendations of the evaluation panels.



They will accept or amend the volunteer recommendations and make the final decision.

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Funding Notification

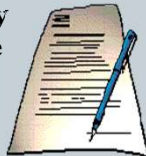
Agencies will be notified of their United Way program funding status by Friday, June 4

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Agency Agreement


Funded agencies are required to sign the United Way agency agreement in order to receive United Way funding.



It must be received before funding will begin.


It is due by Thursday, July 15.

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Funding Payments

All required documents must be submitted online before funding will be disbursed.



Payments are made quarterly, with the first one mailed on Friday, July 30.

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**United Way of Chatham County
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Required Reports

Funded agencies are required to submit a mid-year report and a year-end report for each funded program.

Reports address the program's progress toward meeting the United Way goals and objectives you indicated your program will achieve. They also confirm that funding is being utilized as agreed.

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**United Way of Chatham County
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Required Reports

Reports must be submitted online & on time.

**The mid-year report is due
Friday, January 14, 2022**

**The year-end report is due
Friday, July 15, 2022**



Late submission of required certification documents and/or reports will result in a delay of payment.

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**A thorough review of the
funding application is next!**