

**REQUEST for FUNDING for 2009 – Part I: Sec. E – Client Service/Allocation Summary**

**ALL COUNTIES**

*\*Complete using only United Way monies.*

ALLOCATION FROM	CLIENTS SERVED 2007	\$ ACTUAL 2007	PROJECTED CLIENTS 2008	\$ BUDGET 2008	% INCREASE (DECREASE) \$ - 06 to 07	Projected CLIENTS 2009	\$ Requested 2009	% INCREASE (DECREASE) \$ - 07 to 08
<b>DICKENSON</b>		*		*			*	
<b>RUSSELL</b>		*		*			*	
<b>SCOTT</b>		*		*			*	
<b>WISE</b>		*		*			*	
<b>TOTAL UWSWA</b>								
<b>ALL OTHER UNITED WAY</b>								
<b>SUPPLEMENTAL FUNDRAISING</b>								

1.) How much of your budget is covered by United Way allocations?  
 \$ \_\_\_\_\_ % of Total Budget

2.) How much of your budget is spent on administrative and general cost?  
 \$ \_\_\_\_\_ % of Total Budget

3.) How much of your budget is spent directly on client services/programs?  
 \$ \_\_\_\_\_ % of Total Budget

4.) Does your organization have a reserve or contingency fund? Yes \_\_\_ No \_\_\_  
***If yes, refer to Budget Form # 3 – Supplemental Information: Item – B.***



**UNITED WAY OF SOUTHWEST VIRGINIA**  
**REQUEST for FUNDING for 2009 – Part II: MEMBER AGENCY AGREEMENT**

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For the purpose of sharing in the funds to be raised by the United Way of Southwest Virginia and the local County Advisory Boards, this organization agrees:

1. To maintain responsible management, with a qualified Board of unpaid Directors or Administrative Body, which shall meet on a regular basis during the year.
2. To cooperate with other social agencies in preventing duplication of effort and in promoting effective services, and efficiency and economy of administration.
3. To advise the United Way and Advisory Board of planned large fundraising campaigns or new programs during the year.
4. To keep complete books of account open to inspection by authorized people.
5. That, in the event of the termination of agency services, allocated United Way funds shall revert to the United Way for reallocation to a functioning agency.
6. To provide services to all persons without discrimination because of race, religion, age, national origin, sex, or disability status.
7. To refrain from major fundraising in September and October.
8. To publicize fact that agency is a member of the United Way and use logo on published material.
9. To cooperate during campaign time with agency tours, presentations, requests for publicity, and staff/ Board solicitation during the campaign.
10. To accept final funding of approved agency budget based on the percentage of actual collections by the United Way. The percentage of actual collections equals the percentage of dispersion by the United Way and the Advisory Board.
11. To notify the United Way of Southwest Virginia immediately upon any change in the agency's tax exempt status under IRS code 501 ( c ) 3.

This agreement should be properly signed and accompany the application for funding.

AGENCY

\_\_\_\_\_Refer to Signature Sheet\_\_\_\_\_  
DATE

\_\_\_\_\_Refer to Signature Sheet\_\_\_\_\_  
CHIEF PROFESSIONAL OFFICER

\_\_\_\_\_Refer to Signature Sheet\_\_\_\_\_  
CHIEF VOLUNTEER OFFICER

## COUNTERTERRORISM COMPLIANCE MEASURES

In compliance with the USA PATRIOT Act and other counterterrorism laws, the United Way of Southwest Virginia requires that each agency certify the following:

"I hereby certify on behalf of \_\_\_\_\_ *[name of grantee]* that all United Way funds and donations will be used in compliance with all applicable anti-terrorist financing and asset control laws, statutes and executive orders."

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Signature: \_\_\_\_\_ Refer to Signature Sheet \_\_\_\_\_ Title: \_\_\_\_\_

SIGNATURE SHEET

Agency Name:

Name of Chief Professional Officer: \_\_\_\_\_ Initials: \_\_\_\_\_

Name of Chief Volunteer Officer: \_\_\_\_\_ Initials: \_\_\_\_\_

The purpose of this page is to facilitate the compliance of a Governing Body review of this United Way Application, its contents entirely, the terms of agreements and issues of compliance, by providing one page for signature. Three areas are covered in this application and are as follows.

1. The United Way Application for 2009.

This Application was considered and approved by our Board of Directors on \_\_\_\_\_ DATE

Initials: \_\_\_\_\_

Initials: \_\_\_\_\_

2. The Member Agency Agreement.

This agreement was reviewed and accepted by the Board of Directors on \_\_\_\_\_ DATE

Initials: \_\_\_\_\_

Initials: \_\_\_\_\_

3. Counterterrorism Compliance Measures.

This statement was reviewed and accepted by the Board of Directors on \_\_\_\_\_ DATE

Initials: \_\_\_\_\_

Initials: \_\_\_\_\_

Chief Professional Officer

Title

Chief Volunteer Officer

Title

Date of original signatures: \_\_\_\_\_

**REQUEST for FUNDING for 2009 – Part II: Budget Form # 1 - Agency**

Agency	Fiscal 07 Actual	Fiscal 08 Revised	% Increase or (Decrease) 07 to 08	Fiscal 09 Proposed	% Increase or (Decrease) 08 to 09
<b>Support and Revenue</b>					
1. Allocation from all Southwest Virginia Counties					
2. Contributions					
3. Restricted Contributions and Bequests					
4. Revenue Grants from Government Agencies					
5. Revenue from other United Ways					
6. Membership Dues					
7. Program Service Fees					
8. Sales of Materials/ Special Funds					
9. Transfers from Endowment Funds					
10. Miscellaneous Revenues/ Investment Income					
<b>11. Total Support and Revenue (Lines 1 - 10)</b>					
<b>Expenses</b>					
12. Employee Compensation and Related Expense					
13. Operating Expenses					
14. Professional Fees					
15. Travel and Staff Training					
16. Specific Assistance to Individuals					
17. Membership Dues/ Affiliated Organizations					
18. Other Expenses (see below)**					
19. Miscellaneous					
20. Transfers to Endowments/ Other Funds					
<b>21. Total Expenses for Budget Period (Lines 12-20)</b>					
22. Depreciation of Buildings and Equipment					
23. Major Property and Equipment Acquisition					
<b>24. Total Expenses (Lines 21-23)</b>					
<b>25. Cost per client (Line 21 divided by # of clients)</b>					
<b>26. Total Surplus or (Deficit) (Line 11 minus Line 24)</b>					

\*\*Note here what items are included in "Other" Category:

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NOTE: Depreciation should only be included in the line provided above.

**REQUEST for FUNDING for 2009 – Part II: Budget Form # 2 - Program**

Agency _  Program	Fiscal 07 Actual	Fiscal 08 Revised	% Increase or (Decrease) 07 to 08	Fiscal 09 Proposed	% Increase or (Decrease) 08 to 09
<b>Use a separate sheet for each program.</b>					
<b>Support and Revenue (Program Specific)</b>					
1. UW Allocation from all Southwest Virginia Counties					
2. Revenue from other United Ways					
3. Other contributions and gifts					
4. Revenue Grants from Government Agencies					
5. Program service fees					
6. Other revenues (List on lines 6-10)					
7.					
8.					
9.					
10.					
<b>11. Total Support and Revenue (Lines 1 - 10)</b>					
<b>Expenses</b>					
12. Employee Compensation and Related Expense					
13. Operating and administrative Expenses					
14. Professional Fees					
15. Specific assistance to individuals					
16. Other expenses (List on lines 16-20)					
17.					
18.					
19.					
20.					
<b>21. Total Expenses for Budget Period (Lines 12-20)</b>					
<b>22. Cost per client (Line 21 divided by # of clients)</b>					
<b>23. Total Surplus or (Deficit) (Line 11 minus Line 21)</b>					

**REQUEST for FUNDING for 2009 – Part II: Budget Form # 3 – Supplemental Information**

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**A. RECONCILIATION REPORT**

Complete the following report if the agency's projected revenues (**from Agency Budget – Form #1: Line – 11**) or expenditures (**from Agency Budget – Form # 1: Line – 23**) for 2009 have increased or decreased by more than **25%** from the 2008 budget.

- Line item revenue(s) differing by more than 25% and reason for the difference.

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- Line item expenditure(s) differing by more than 25% and reason for the difference.

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**B. EXPLANATION OF RESERVE FUNDS**

Complete the following report if the agency has reserve funds that exceed **25%** of the agency's 2009 budget.

- Amount in reserve: \$\_

- Source of reserve funds

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- Purpose for which reserve exists

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- Are investment earnings available from the reserve

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Amount available annually \$ .