

**TO THE ALLOCATIONS COMMITTEE
OF THE
HENDERSON COUNTY UNITED WAY**

From Agency:

Name:

Request for Support in the amount of:

Date of Request:

We the undersigned, acting behalf of _____ submit the attached statement of anticipated receipts and expenses as a basis for requesting \$_____ allocation from the Henderson County United Way for the budget year of 2022-2023.

This anticipated budget has been prepared after careful study of the history and experience of _____ and has been reviewed and approved by our Board of Directors at a meeting held on _____ at which time _____ (number) of directors of the entire board consisting of _____ (number) of members were present. Any changed circumstances from our past experience are fully explained in the attached documents.

As a condition to receiving funds from the Henderson County United Way we agree to make contact with potential volunteers, as well as our own board members, to help participate in and assist with the 2022- 2023 Henderson County United Way Campaign scheduled to begin September 2022. Please indicate percent of your Board who donated to United Way in 2021 _____%.

We hereby certify the above Agency has agreed to abide by the "Henderson County United Way Agreement with Participating Members" section of the Henderson County United Way By-Laws as more specifically outlined in Article VIII (*).

Finance or Executive Committee President:

Vice President:

Treasurer:

Budget Chairman:

Secretary:

(*) Copy Enclosed

Additional Information to be Completed and Attached

- I. Name of Agency: _____
Tax-exempt Status: _____ Yes _____ No
(please attach) document reflecting tax exempt status, i.e. 501(c)(3)
Mailing Address: _____

Physical Address: _____

Phone: _____
Website URL: _____
- II. Please attach List of all officers, and/or board members, and/or chairperson. The list should include names, titles, address, daytime phone, evening phone and the amount of any compensation from agency paid to any of these. If your agency does not have a board, list the above information for each of your members.
- III. Please attach List of any paid workers of your agency. The list should include total amount of gross compensation paid in your last fiscal year, plus any car allowance for each employee. Also state current monthly compensation including any car allowance for each employee.
- IV. Detailed history, mission and programs of your agency:
- a. History:
- i. Date agency began in our county _____
 - ii. Geographical area of service _____
- b. Number of children serviced in last fiscal year: _____
- i. Number from western end of county _____
 - ii. Number from eastern end of county _____
 - iii. Number from Athens _____
 - iv. Number non-Henderson County residents _____
- c. Number of adults serviced in last fiscal year: _____
- i. Number from western end of county _____
 - ii. Number from eastern end of county _____
 - iii. Number from Athens: _____
 - iv. Number non-Henderson County residents _____

VIII. Please attach Copy of audit for prior fiscal year.

IX. Dates of your regular meetings: _____
(such as 2nd Tuesday or actual dates)

X. Types and dates of any additional fundraising drives for your agency:

Last fiscal year:

Planned for this year:

XI. List of ways your agency cooperated in the last United Way Drive:

Article VIII

Agreement with Participating Members

Section 1:

For the purpose of sharing the joint fund to be raised by the Henderson County United Way, each member organization so sharing shall agree:

- a) The United Way of Henderson County works because of the collective sharing of resources by the members of our community. In that same spirit we respectfully request agencies and programs assisted by United Way to participate in, and generously support those sponsored events and activities of the United Way intended to further its mission in Henderson County.
- b) After being given full consideration and hearing to accept the apportionment of funds made to it by the Allocations Committee and approved by the Board of Directors.
- c) To maintain a responsible management, with a qualified Board of unpaid directors of administrative committees which will meet at least four (4) times a year.
- d) To cooperate with other social agencies in preventing duplication of effort, and in promoting effective service and efficiency and economy of administration.
- e) To keep complete and regular books of accounts open to inspection by a representative of the Henderson County United Way.
- f) To file with the Henderson County United Way at the end of each fiscal year and otherwise upon request, a certified copy of a complete and satisfactory audit of all accounts and holdings of the organization, unless exempted by the Executive Committee of the Henderson County United Way. To submit to this organization such other reasonable information concerning finances, programs, etc., and in such form as the Board of Directors may require.
- g) To provide proof that such agency is a non-profit organization.
- h) To abide by the rules and regulations promulgated by the Board of Directors of this organization.

Section 2:

- a) On or before June 1 of each calendar year, each participating agency or prospective participating agency that wishes to be included in the drive that is to follow in the Fall shall submit to the Allocations Committee a proposed budget for the ensuing year. After approval thereof by the Allocations Committee and final approval by the Board of Directors, the budget shall constitute a basis of participation in the general fund by the particular agency.
- b) Any agency is permitted to call upon the Henderson County United Way for portions of its budgeted financial needs in advance of the final distribution of general funds, by presenting to the Allocations Committee a formal request for funds, setting forth the need for such advance apportionment.
- c) Annually, upon completion of the general fund drive, the Board of Directors shall appropriate all budgeted funds according to the approved budgeted needs of each agency, and shall direct the Treasurer to pay over to each agency its portion of such funds, in quarterly payments, less any advances which may have been made in accordance with paragraph (b) of this section. The Board may advise the Treasurer to pay the funds that the agencies are to receive over the next twelve (12) months in some manner other than on quarterly payment.
- d) This agreement shall be binding from year to year unless the participating agencies of the Henderson County United Way give notice in writing to the contrary, or the Henderson County United Way advised the agency to the contrary. Notice shall be given prior to June 1 preceding the current financial campaign.