

**GIVE.** >  
EDUCATION. INCOME. HEALTH.

**ADVOCATE.** >  
EDUCATION. INCOME. HEALTH.

**VOLUNTEER.** >  
EDUCATION. INCOME. HEALTH.

# UNITED WAY OF SAMPSON COUNTY

United  
Way



Funding Application Workshop 2017

# Agenda

- Sharing Our Vision
- Sharing Your Vision
- Securing Resources
- Questions



# United Way of Sampson County Vision

- Community Impact: To improve the lives of residents living in our community
- Community Needs Assessment
- Connect UWSC Goals with Agencies
- Consider the Return on Investment



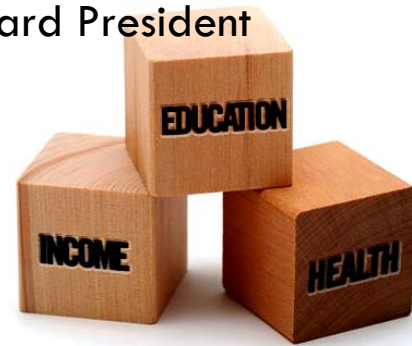
# Share Your Vision

- Use of Funds Statement (pg 2)
  - ▣ Define agency mission and program
  - ▣ Community need addressed
  - ▣ Program goals and outcomes
  - ▣ Funding request
  - ▣ Brief response to consequences if program is unfunded
- Presentation & Request (5 & 5)
  - ▣ Use of Funds Statement as guide
  - ▣ Include basic financial status & program budget



# Securing Resources

- Required Documents: All Partners
  - Financial Records in accordance with Audit Policy
  - Signed Audit Policy
  - Signed Agreement of Affiliation
  - Signed Supplemental Fund Raising Policy Agreement
  - Signed Supplemental Fund Raising Form (if applicable)
  - List of Board of Directors (include addresses)
  - Program Funding Request Application
    - Budget Variance Form
    - Program Staff Positions
    - Program Participant Demographics
- Required Documents: New Partner
  - 501 C (3) IRS tax exemption letter
  - NC Department of Revenue tax exemption letter
  - NC Solicitation License or exemption letter
  - Agency and Program marketing/advertising materials (e.g. brochures)
  - Agency By-laws
  - Board Approved policy regarding non-discrimination signed by the Board President



# Securing Resources: Application

- Due January 5, 2017
- Available Online (submit via email)
- Logic Model
- Supplemental Information
  - ▣ Financial Records in accordance with Audit Policy
  - ▣ Budget Variance Form
  - ▣ Program Staff Positions
  - ▣ Program Participant Demographics



# Logic Model: Objectives

- **Specific**
  - **Measurable**
  - **Aggressive/attainable**
  - **Relevant**
  - **Time bound**
- **Examples:**
    - ▣ Reduce the number of high school dropouts by 50% by 2018.
    - ▣ Increase number of youth and adults practicing a healthy lifestyle by one-third in five years.



# Logic Model: Inputs & Outputs

## Inputs

- Resources allocated to program & activities
- Examples:
  - ▣ # staff & volunteers
  - ▣ # dollars spent
  - ▣ # hours committed

## Outputs

- Amount of service provided
- Examples:
  - ▣ # participants
  - ▣ # meals provided
  - ▣ # programs/activities
  - ▣ # widgets created

These are workload numbers, not true indicators of results.



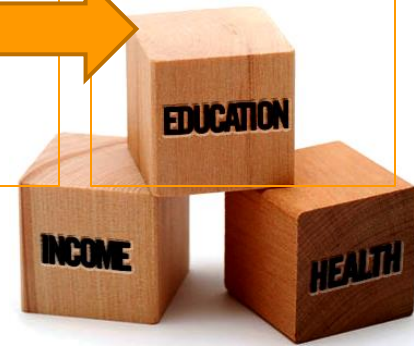
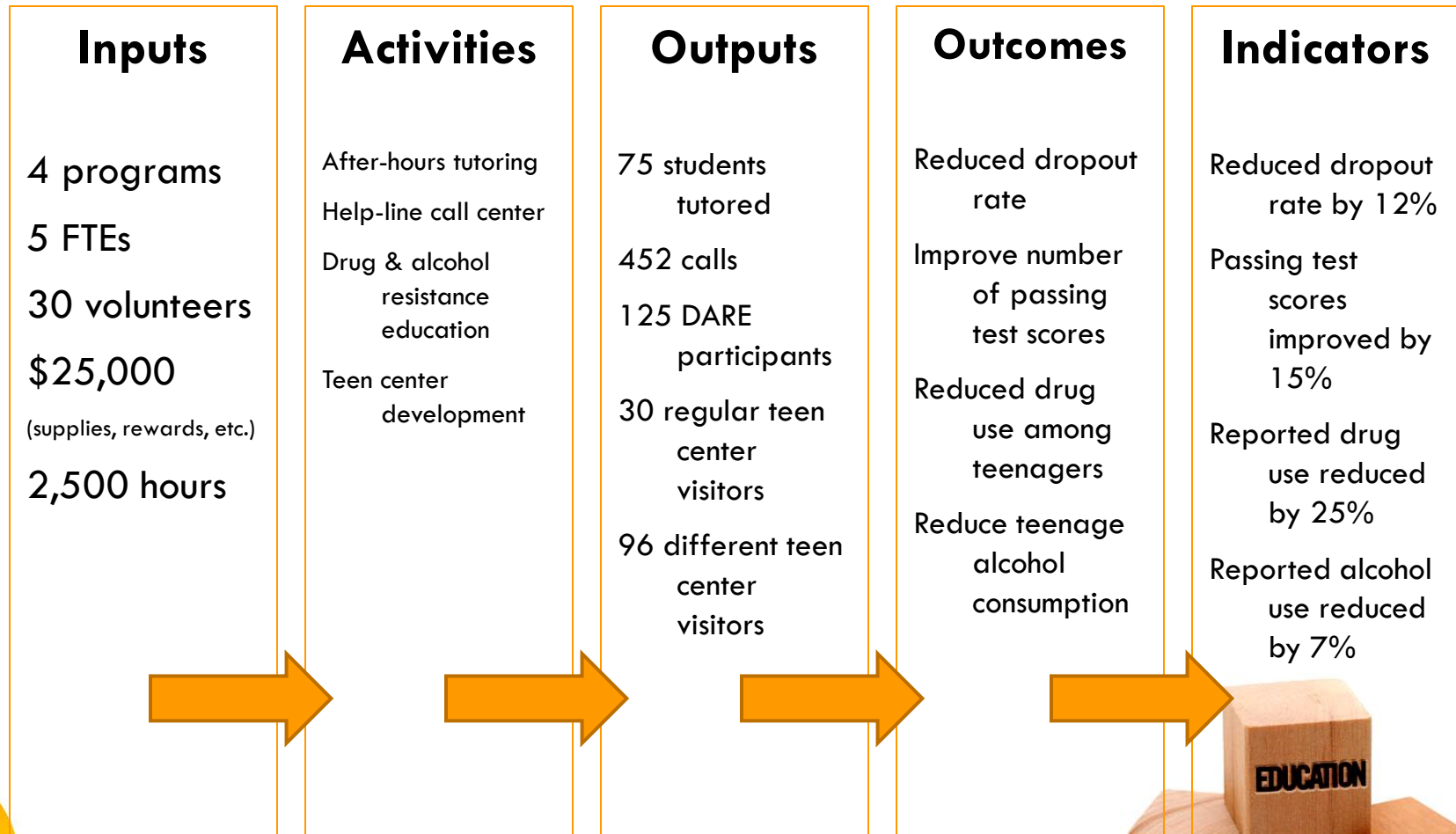


# Logic Model: Outcomes

- Objective associated with goal
- Indicators of success or quality
- What did the outputs produce?
- Example:
  - Number of high school dropouts decreased from 50 to 40 (20%).
  - Increase in number of adults reporting healthy lifestyles by 10%.



# Logic Model



# Logic Model

- Data Source
  - ▣ Where did the data come from?
  - ▣ Assessments, reports, records, case studies, logs, etc.
- Data Collection Method
  - ▣ How was the data obtained or developed?
  - ▣ Observations, interviews, tests, surveys, etc.



# Supplemental Information

- Financial Records in accordance with Audit Policy
  - ▣ A copy of the financial statements audited by a certified public; OR
  - ▣ A copy of a review performed by a certified public accountant; OR
  - ▣ A copy of a compilation performed by an independent public accountant accompanied by a statement signed by 3 members of the governing board; OR
  - ▣ A copy of your completed current year IRS Form 990 accompanied by a statement signed by 3 members of the governing board, an income statement, balance sheet, & prior 6 months of bank statements.
- Budget Variance Form
  - ▣ Program, **NOT** Agency
- Program Staff Positions
- Program Participant Demographics



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Nancy S. Carr

# Questions?

[www.unitedwaysampson.org](http://www.unitedwaysampson.org)

[www.liveunited.org](http://www.liveunited.org)

[www.national.unitedway.org](http://www.national.unitedway.org)

