

FUND DISTRIBUTION CHECKLIST FOR 2015 GRANTS

Before you send your allocations application in, please make sure the following elements have been completed and are enclosed with your application. All requests must be in our office by **4:00 pm on September 12, 2014.**

_____ Funding Application Cover Sheet with dated signature(s)

_____ Program Information Sheet (s) – **Make sure you have one for each program for which you are requesting United Way funding** Program Info Cover Sheet

_____ **We have eliminated previously used budget forms.**

Please insert after the Program Information Sheet (s) your agency-wide budget, support & revenue, and expenses using the following guidelines:

- Clearly identify the fiscal year
- Provide us with the following years:
 - FY 2012 Actual
 - FY 2013 Budgeted and Actual
 - FY 2014 Projected (current year)
 - FY 2015 Proposed
- You may use your own Chart of Accounts
- The preferred format is a table or excel worksheet with a column for each of the years, with Revenue on one page and Expenses on another. However, if another format is easier for you, feel free to use that, keeping in mind that our volunteers will be comparing years and items.
- Please explain any major differences between any two years and also between any budgeted and actual for a year.
- Prior to depreciation, if you had or are projecting an excess or deficit in any year, please explain either how you used it or how you funded it.

_____ Grants & Collaborations

_____ List of Board Members & Attendance Records

PLEASE INDICATE HOW MANY OF YOUR BOARD MEMBERS ARE CLIENTS WHO ARE CURRENTLY RECEIVING SERVICES

_____ Copy of your most recent agency audit

_____ Copy of your most recent Management Letter from Audit Firm

_____ A SIGNED copy of your most recent IRS 990 (make sure it has a signature on the first page).

_____ **2015 Supplemental Fundraising Events Calendar** listing the events and the dates on which they will occur