



OVERVIEW FOR ALLOCATION OF UNITED WAY FUNDS

The Watertown Area United Way is people helping people. It is a local independent non-profit organization funded by thousands of individuals and businesses who generously share with their community by contributing to the annual United Way Campaign. The Watertown Area United Way is an organization of local volunteers that in turn reaches out to other organizations offering financial support for services that benefit people in need in the Watertown area.

In reviewing applications for United Way funding, the Watertown Area United Way Allocations Committee is most interested in projects that provide services in the areas of health and safety, human and social services, wholesome recreation for children, or other major community needs. Preference is given to programs that impact a broad constituency in the Watertown area relative to the funding requested, and to requests for funding operational expenses rather than capital expenditures. A group requesting funding may be expected to demonstrate that the needs it addresses are not otherwise being met adequately in the area. The Watertown Area United Way encourages cooperation among United Way Agencies. ***Please be reminded that all funds allocated during the 2020 year are dependent upon the United Way reaching its Campaign Goal. Should the Goal not be met, the Allocation's Committee would adjust the allocated amounts accordingly.***

Any organization applying for funding from the Watertown Area United Way must meet the following requirements:

1. Be incorporated as a nonprofit/charitable (501(c)(3)) organization to which contributed income is fully exempt under Federal and State law. A COPY OF THE LETTER CERTIFYING YOUR TAX EXEMPT STATUS UNDER INTERNAL REVENUE CODE SECTION 501(c)(3) MUST ACCOMPANY THIS APPLICATION, UNLESS PREVIOUSLY SUBMITTED.
2. Be governed by a responsible and active volunteer Board of Directors that serves without pay, meets regularly, and exercises effective administrative control.
3. Complete and submit all application information, financial forms, audits, etc.
4. Submit most recent IRS 990.
5. Have a written policy of nondiscrimination, a copy of which must accompany this application, unless previously submitted.
6. Have operated in this community for one full year before applying for Watertown Area United Way funding.
7. Attend both the United Way Kick-off & Wrap-Up Events.
8. Submit a completed Black-Out Policy form.
We understand that we are expected to refrain from conducting any fund raising drives (solicitation) during the period of **September 1 through November 1** (i.e. selling tickets for special events, holding special events, marketing events as a fundraiser, selling coupon booklets, etc.). This time period is reserved for the United Way campaign.

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If an exception to the policy is being requested, Agency requests to hold fundraising events during the Black-out period must be received in writing 45 days prior to the event. The Watertown Area United Way Board of Directors will review each request and notify the agency if a special exception has been granted or approved.

PLEASE NOTE: A United Way Agency may conduct fund raising (solicitation) for youth activities by selling raffle tickets or merchandise, and the fund raising (solicitation) is being conducted during the time period reserved for the United Way campaign because either:

- 1) This is the time for the youth activity to be held according to the Watertown School District Calendar; or
 - 2) The fund raising (solicitation) is being conducted in accordance with a national fund raising event.
9. Provide at least one **NEW** success story to the United Way office of how your organization is helping people in our community and the surrounding areas. **Electronic copies of photos** for your program that may be used for United Way publicity must be emailed to lisa@watertownunitedway.org.
10. Complete and submit a Counterterrorism Compliance Certification form stating that you are in compliance with the USA Patriot Act. All funded agencies will also be screened against the federal terrorism "watch list".

A representative of the applying agency is required to appear before the Watertown Area United Way Allocations Committee to give a brief presentation and answer any questions. **You will receive a notification, once Allocation Interviews have been scheduled.** The Watertown Area United Way Board of Directors makes the final decision concerning allocation of United Way funds and reserves the right to approve or deny any application for funding, whether based on the above criteria and requirements or for any other reason.

In addition to the above requirements, it is important that we publicly recognize our partner agencies; therefore, a representative is required to attend the **Kick-off Event, Recognition Celebration, and any Agency Meetings.**

Submission of this application constitutes confirmation by the applicant that it meets and agrees to comply with the requirements set out above. **Failure to comply with these requirements may result in a reduction or loss of funding.**