

## 2022 ALLOCATION APPLICATION CHECKLIST

This checklist is not required by Watertown Area United Way but is here to help you navigate the Allocation Application process. Please submit your online application by the deadline of **5:00 p.m. on Friday, April 29, 2022**. The items listed below you will be able to upload within your online application.

### ALL APPLICANTS WILL SUBMIT THE GENERAL DOCUMENTS LISTED BELOW.

Items below are needed <b>within the online 2022 Allocation Application for 2023 funding.</b>	
	List of Board Members and their phone, email, and employer if employed.
	2022 & 2023 Program Budgets
	Upload a copy of "Agency Financial Report." To download go to <a href="http://www.watertownunitedway.org">www.watertownunitedway.org</a> or the <a href="#">google document</a> .
	Upload a copy of "Agency Revenue Savings Worksheet." To download go to <a href="http://www.watertownunitedway.org">www.watertownunitedway.org</a> or the <a href="#">google document</a> .
	Upload a copy of "Agency Revenue, Expense and Reserve Supplement." To download go to <a href="http://www.watertownunitedway.org">www.watertownunitedway.org</a> or the <a href="#">google document</a> .
	Upload a copy of "Program Financial Report." To download go to <a href="http://www.watertownunitedway.org">www.watertownunitedway.org</a> or the <a href="#">google document</a> .
	Upload a copy of "Program Revenue and Expense Supplement." To download go to <a href="http://www.watertownunitedway.org">www.watertownunitedway.org</a> or the <a href="#">google document</a> .
	Provide at least one <b>NEW*</b> success story on how your organization's program is assisting people in our community and the surrounding areas. The story can be from as early as January 1, 2021, to late as April 28, 2022.
	Provide up to 5 photos related to your success story within the application. If you have trouble uploading or have additional program photos, then send to <a href="mailto:director@watertownunitedwya.org">director@watertownunitedwya.org</a> .
	Complete the Counterterrorism Compliance section within the online application.
	Submit a copy of your IRS determination letter stating you are a 501(c)3 organization <b>if applicable</b> . If you are not a 501(c)(3), please provide an organizational chart or letter explaining what your organization is and how it is governed. (Ex. County Program) For a sample organization chart visit <a href="#">Organizational Chart - What is an Organization Chart? Definition, Types, Tips, Tutorial, and Examples (smartdraw.com)</a> .
	If you believe it would be beneficial to our Board of Directors reviewing your application, upload an optional budget narrative on the last page. For a sample budget narrative visit <a href="#">Budget Narrative Justification Example.pdf (dc.gov)</a> .

**DENPING ON YOUR TOTAL BUDGET, APPLICANTS WILL SUBMIT THE FINANCIAL DOCUMENTS BELOW.**

Please see our [Financial Accountability Requirements for Partner Agencies](#) for more information. Depending on your organization's total budget you will be required to submit different financial reporting documents. Below are checklists for each level. With questions call or email United Way.

Total Budget \$100,000 or more	
	Copy of your most recent Audit.
	Copy of your most recent IRS 990.
	Copy of your most recent W-9.
	Copy of your most recent Management Letter from audit firm <b>if applicable.</b>

Total Budget under \$100,000	
	Statement from a financial committee or Board Treasurer explain review of financials.
	Statement describing the process used to minimize risk of embezzlement, fraud, or financial mismanagement.
	Year end financial statement(s).
	Plan to conduct an audit in the future.
	Copy of your most recent IRS 990 <b>if applicable.</b>
	Copy of your most recent W-9 <b>if applicable.</b>

Total Budget under \$25,000	
	Contact Watertown Area United Way office at (605) 886-5815 or <a href="mailto:director@wartertownunited.org">director@wartertownunited.org</a> .

Total Budget over \$100,000 but do not conduct audit.	
	Contact Watertown Area United Way office at (605) 886-5815 or <a href="mailto:director@wartertownunited.org">director@wartertownunited.org</a> .