



United Way of Eddy County

# Funding Strategies

## **Mission Statement:**

Be the steward of a voluntary process that identifies health and human service needs and responsibly applies financial and human resources to impact those needs.

116 S. Canyon St.  
PO Drawer EE  
Carlsbad, NM 88221  
575-887-3504  
[www.uweddyco.org](http://www.uweddyco.org)  
EIN: 85-6004416

## **BOARD APPROVAL**

United Way of Eddy County Funding Strategies have been approved by the Board of Directors on December 18, 2014. All current *participating agencies* will be notified the 1<sup>st</sup> quarter of 2015 about the change in 2016 going forward. **Updates are made by a majority vote by the current Board of Directors at any board meeting of their choice.**

These documents will supersede any verbal conversations. Any complaints or questions, should be addressed in writing to the Board of Directors at:

United Way of Eddy County  
Board of Directors  
PO Drawer EE  
Carlsbad, NM 88221  
[director@uweddyco.org](mailto:director@uweddyco.org)

## NEW FUNDING STRATEGIES

United Way of Eddy County recognizing the significant changes in charitable giving and will be making changes in our allocation process. The change in United Way funding is to implement an innovative, competitive, inclusive, flexible and results focused, distribution process to help the most vulnerable people in our community. Therefore, effective with the January 2016 grant process, 100% of all grants issued will be via our Community Impact Grant or Emerging Community Impact Grant.

### Why did United Way develop new strategies to allocate contributions?

Donors today have competing choices for their charitable dollars. They also want measurable results and much more accountability for the money they invest in United Way. The new process is necessary to clearly define United Way's role and results be measurable. Its purpose is to reestablish United Way as the donors' first choice in "helping those most vulnerable".

### How do these new Funding Strategies differ from the past?

- **United Way is more inclusive** – any 501 (c)3 non-profit health and human service organization in Eddy County may apply. Requesting funds from United Way is now an open, competitive process. United Way no longer has member agencies. Organizations receiving funding in the new process will be called **participating agencies**.
- **Results will be measured.** Funding is now contingent upon achievement of agreed upon goals between United Way and the **participating agencies**.

### How do organizations apply for Community Impact funding?

- Grant applications will be distributed in the 4<sup>th</sup> quarter of every year and due back to the United Way office by January 15<sup>th</sup> (or date set on the application).
- All grant applications must be completed online at <https://www.uweddyco.org/grantrequests>
- Late applications will NOT be accepted and NO exceptions will be made.
- All organizations applying must sign the Anti-Terrorism agreement.
- All organizations approved for funding are required to sign an Annual Memorandum of Agreement.
- Organizations may be asked to present their grant application to the United Way Allocations Committee or members of the board.
- Additional grant money will be set aside for Emerging Community Impact Needs.

### How much money can agencies apply for?

- Agencies applying for funding for the **same program** for which they are currently funded:
  - Request up to and **NO MORE THAN 125%** of the amount awarded for the previous funding cycle.
  - Programs may apply for **up to 50% of the program budget but not to exceed 125% of the amount awarded** the previous funding cycle.
- Agencies applying for funding for a program **not** currently being funded:
  - Programs may apply for **up to 50%** of the program budget

### What geographic area will my money be impacting?

- **All money raised in specific geographic areas will impact those same areas.**
  - All money raised in South Eddy County will be allocated to South Eddy County non-profits.
  - All money raised in North Eddy County will be allocated to the North Eddy County non-profits.

## What items can Community Impact Money be used for?

- **Staff specific to facilitate this program**
- **Administrative staff to support this program** – not to exceed 25% of budgeted expense
- **Office supplies for program** – actual expenses
- **Advertising & printing to promote program** – actual expenses
- **Travel for volunteer or staff training**
- **Dues & Subscriptions to support this program** - actual expenses
- **Occupancy** - actual expenses
- **Professional fees to support this program** – actual expenses
- **Equipment specific to this program** - All equipment purchases requested should be justified by showing the need for equipment and full integration with the planned activities. Equipment requested over \$500 per item should be accompanied by three bids.
- **Other supplies specific to this program** - actual expenses

Community Impact Funding can only be used for budgeted items included in the grant application for the program specified. If any expenditures for a specific budgeted line item needs to be changed by more than 10%, a request should be made in writing to the Board of the Directors Allocations Committee requesting the change using form UWEC-Budget-12-14.

Any money not expended within the guidelines established or not expended during grant period of January 1-December 31 with ample time for program to be facilitated, in excess of 10%, must be returned to United Way. The Allocations Committee will review all reports and communication will be made with **participating agency** if there are any concerns with expenditures incurred. If the Allocations Committee recommends to the Board of Directors that money be returned and the Board of Directors ratifies, **participating agency** must return any unspent or money not spent according to the budget within 30 days.

## What reports are required for Community Impact Funding?

The **participating agency** will provide UWEC with written mid-year and year-end reports by the due date that provides an update on how the **participating agency** is progressing towards meeting outcomes from the Logic Model submitted. Report must be signed by the Director and the Board President/Chair.

Each **participating agency** is also required to submit financial reports as requested by UWEC. The report should include a Balance Sheet, Statement of Income & Expenses, and Budget vs. Actual for the program money is granted. (If Quick books is the accounting system used, a print out of these reports is acceptable and no other form is needed.) Along with the financial report, if funding is restricted, all receipts associated with the expenses listed must be submitted. Financial reports must be signed by the Director, Board President/Chair and the Board Treasurer.

All reports must be submitted electronically. All reports are due by the 15th of January and July. Reports that are received by the deadline will have their allocations payment processed within 15 business days. No allocation payments will be processed for **participating agencies** submitting late reports, until all reports have been satisfactory reviewed by the Allocations Committee.

## **ADMINISTRATIVE GUIDELINES**

- A. The Board of Directors of United Way of Eddy County will establish Priority Focus Areas, describing and our ability to make a difference in the areas: including independent research findings, and input from community leaders and service providers.
- B. The United Way of Eddy County Board of Directors will determine the amount of unrestricted campaign dollars.
- C. All organizations are expected to secure as much financial support as possible from other sources before seeking United Way assistance.
- D. United Way will fund a maximum of 50% of a program budget.
- E. Fundraising federations are not eligible to apply for United Way funding.
- F. All award letters will have the statement "Failure to comply with the Memorandum of Agreement, will included financial penalties up to and including the loss of all funding for the remainder of the fiscal year."

## DONOR DESIGNATIONS POLICY

1. Donations can be designated to a United Way Impact Area, a specific United Way Community Partner, a United Way Strategic Initiative, other United Ways or any health or human services 501(c)(3) organization.
2. A Board approved administrative fee will be deducted from any pledge/donation that is designated to a health or human service 501 (c) 3 organization.
3. Designations to a non-United Way health or human services provider:
  - a. Number of designations is not limited.
  - b. Non-United Way health or human services providers will be required to submit a certified, signed copy of the Patriot Act Agreement, a copy of 501(c)(3) status and mission statement in order to receive the donation.
  - c. Designations exclude civic (i.e. Rotary, Lions Club), educational (i.e. school, university) or arts-related (i.e. symphony, art museum) organizations.
4. Any designations to United Way's Participating Agencies will be paid directly to the agency every quarter. Donor designations will be paid in addition to any grant amount awarded.
5. Any corporate matches will not follow the designation but will be placed in the United Way General Fund.
6. Designations to non-participating agencies will be paid quarterly as money is received.

## **DONOR DESIGNATION PROCEDURES**

1. Contributors making one or more designations must contribute \$100 or more per designation.
2. United Way will make every reasonable attempt to communicate with contributors regarding questionable designations for purpose of clarification or change in designation.
3. Donors who designate to non-grantees which lack required documentation, or non-grantees which do not meet eligibility criteria, will be notified in writing and asked to re-designate their contributions. When a donor does not respond to such an inquiry (within 14 calendar days), the contribution will be distributed through the Community Impact General Fund.
4. Agencies that do not respond to a request for documentation (within 14 calendar days), which send incomplete documentation, or decline participation, will be considered invalid for the current campaign. These funds will be rolled into the Community Impact General Fund and the donor will be notified.
5. All checks should be made payable to United Way of Eddy County for auditing purposes.
6. Agency designations will be paid the quarter following the quarter received.
7. All designations are subject to an administrative fee that will be deducted prior to their distribution. Collection loss will also be applied as appropriate.
8. The donor's information will be kept confidential, and will NOT be shared with an agency unless the donor has requested an acknowledgement.
9. Promotion and/or solicitation of designations is prohibited. Agencies violating this policy may become ineligible to receive designations from this program and the contributor will be so informed.
10. A fee will be set annually to cover collection loss and administrative costs. The Board of Directors will evaluate these costs and a recommendation will be made to establish appropriate fees. One-time full cash payments will be exempt from the collection loss portion of the fees.

## PRIORITY FOCUS AREAS

The United Way of Eddy County Board of Directors have identified the following areas as critical areas of impact within our community. This list is not prioritized and we ask **participating agencies** to provide services to clients in one or more of these areas of service:

- Health
- Education
- Income Support

<b>Funding Priority</b>	<b>Summary</b>
<b>Tier 1: Community Impact Funding focusing on board designated focus area</b>	United Way will partner with organizations that provide services focusing on fulfilling the needs of the board designated focus area. These organizations will receive priority when funding decisions are made. The United Way Allocations committee will evaluate organizations and make the recommended funding decisions as to which organizations will be in Tier 1 funding and the dollar amount they will be awarded. Funding is based on the calendar year.
<b>Tier 2: Community Impact Grant Funding</b>	United Way will partner with organizations that submit a grant application by the deadline and focus on providing resources to help our communities most vulnerable including those that prevent crises or help pick up the pieces after one occurs; organizations that assist individuals in becoming productive members of society, help at-risk and families in poverty situations who need tools and resources to advance their lives; organizations that contribute to the overall quality of life in a community; organizations the focus on improving education for individuals of all ages. Funding is based on the calendar year. (Exceptions may be made by the Board of Directors on funding cycle based on need of organization and United Way.)
<b>Tier 3: Emerging Community Impact Grant Funding</b>	United Way will partner with organizations that do not submit grant applications by the deadline for specific needs by the deadline and focus on Tier 1 or Tier 2 needs or if the need emerges after grants due. This funding is open year around as funding allows.



## ALLOCATION POLICY

The allocation process is one of the most important responsibilities of the United Way of Eddy County. Allocations must be reviewed and determined by the Allocations Committee which is made up of duly elected members of the Board of Directors and may include members of the community. The Treasurer will serve as the Chair of the Allocations Committee. The allocation process will strive to encourage collaborative efforts among agencies/programs and avoid unwarranted duplication of services. Any significant reductions in funding will be implemented in a manner that is supportive of the *participating agency* and in the best interest of the community.

### 1. Allocations Committee Responsibilities:

In addition to the duties assigned by the Bylaws, a function of the Allocations Committee is to determine the eligibility of organizations that request funding from the United Way and recommend acceptance or rejection of the programs to receive funding.

The mission of United Way of Eddy County is to be the steward of a voluntary process that identifies health and human service needs and responsibly applies financial and human resources to impact those needs. Allocations Committee Members are expected to become thoroughly familiar with all *participating agencies*, documentation provided and to participate fully in the allocation process. An orientation will be given to all Allocations Committee Members and attendance is mandatory. The Allocation Committee and United Way staff will maintain a philosophy of accountability to donors and to the community for funded programs. Allocation Committee members are asked to serve a minimum of two years to bring consistency and stability to this process.

The Allocation Committee Chairperson will bring funding recommendations to the Board of Directors for their final approval the first quarter of every calendar year.

One committee comprised of local community members will be established for South Eddy County grants and one committee of local community members will be established for North Eddy County grants.

### 2. Funding Guidelines:

The United Way of Eddy County Board of Directors have identified the following areas as critical areas of impact within our community. This list is not prioritized and we ask partner agencies to provide services to clients in one or more of these areas of service:

- Health
- Education
- Income Support

### 3. Community Needs:

United Way of Eddy County will periodically compile needs assessment data using a variety of reliable and valid sources. Once this information is compiled, a subcommittee of the Board of Directors of United Way of Eddy County will interpret and prioritize community needs. A recommendation will then be made to the entire United Way Board of Directors for funding priorities.

### 4. Allocation Criteria and Standards:

Any agencies wishing to apply for funding from United Way of Eddy County must meet all requirements and standards as set forth in the Annual Memorandum of Agreement. Additional funding may be available for *participating agencies* that adhere to the agency responsibilities of the Memorandum of Agreement.

### 5. Appeals:

Each application is carefully reviewed by the Allocation Committee and all funding is approved by the Board of Directors; therefore, there will be no appeals on the funding amounts granted.

## ALLOCATION PROCESS

The Allocation Committee is inclusive of elected members of the Board of Directors and may include other members of the community. All of which are community leaders and donors and is chaired by the Board Treasurer.



**DATES TO REMEMBER**

**January**  
Year End Report Due by the 15<sup>th</sup>  
-----  
Grant applications are due by 15<sup>th</sup>  
4th Q - Funding Distribution

**February**

**March**  
Community Impact Grant Applicants  
will be notified of funding decisions

**April**  
1<sup>st</sup> Q - Funding Distribution

**May**

**June**

**July**  
Mid year Report Due by the 15<sup>th</sup>  
2<sup>nd</sup> Q - Funding Distribution

**August**  
United Way Campaign

**September**  
**United Way Campaign**  
Avoid direct solicitation to individuals  
and businesses

**October**  
**United Way Campaign**  
Avoid direct solicitation to individuals  
and businesses  
3<sup>rd</sup> Q - Funding Distribution

**November**  
United Way Campaign

**December**  
United Way Campaign

All reports must be submitted electronically to [director@uweddyco.org](mailto:director@uweddyco.org) and one hard copy to PO  
Drawer EE, Carlsbad, NM 88221 or hand delivered to: 116 S. Canyon

## Annual Memorandum of Agreement

The purpose of this Memorandum of Agreement is to define a cooperative and mutually beneficial relationship between United Way of Eddy County (UWEC) and its **participating agencies**, so that we agree on a purpose common to all stakeholders; donors, clients, agencies and UWEC. This agreement is to be signed annually by both parties before allocations may be released and must be signed by the **participating agencies** Director and Board President/Chair.

*Receipt of funding is contingent upon signing this agreement. All funding is contingent upon the availability of funds and the **participating agencies** ability to provide quality service to its clients. Nothing in this document is to be construed as a guarantee of funding.*

### GENERAL PRINCIPLES

1. Strong, voluntary and vital agencies meeting the human service needs of the people of Eddy County are essential to the health and welfare of our community.
2. A local combined campaign is an efficient and effective way to raise funds for the **participating agencies**.
3. Human service planning and the allocation of funds based upon citizens' review of services is the most effective means of meeting the human service needs of our community.
4. **Participating agencies** must be, in part, funded by local contributions and administered by local citizens concerned about improving the quality of life in Eddy County.
5. Clear understanding and mutual acceptance of the respective roles of the United Way and the **participating agencies** are essential to their joint effort to meet the local human service's needs.

With these mutual beliefs in mind, the United Way and the Participating Agency agree to work cooperatively to increase the public's awareness and understanding of the human services needs of Eddy County and to work together to meet these needs.

### UWEC and the Participating Agencies agree to:

1. Maintain a volunteer governing board that is representative of the community and meets regularly to establish policy and to exercise responsibility for the organization's administration and financial management.
2. Work cooperatively and collaboratively with each other and with other agencies, both private and public, in meeting the health and human services needs in our community.
3. Comply with all applicable laws and regulations.
4. Maintain accurate financial records and a system of accounting in accordance with Generally Accepted Accounting Principles.

### UWEC Responsibilities:

1. Fundraising Campaign – To conduct an annual community-wide fundraising campaign to meet the needs of the community, taking into consideration the financial needs of agencies, economic climate and the best interest of its donors. UWEC will concentrate its fundraising activities during August – December. However, various events will be hosted on a regular basis to bring awareness to our program.
2. Fund Distribution – Conduct an annual fund distribution process. Participating agencies shall be eligible to apply for and receive undesignated campaign funds during this process. UWEC reserves the right to direct funds to a specific program or programs within the agency. Maintain responsible stewardship on behalf of contributors, **participating agencies** and the community at large by making information about campaign allocations available to the public.
3. Community Assessment – UWEC will collaborate in the assessment of community needs and resources.
4. Marketing, Communication and Referral – UWEC will help promote **participating agencies**, inform the community of available agency services, and refer public inquiries to appropriate agencies.
5. Planning and Collaboration – The UWEC will encourage and help coordinate the interaction of **participating agencies** with other agencies, community leaders and other stakeholders.
6. Payments – Donor Designated gifts will be forwarded to **participating agencies**. Donor information will be provided, to the extent possible. Payments of both designations and allocations will be made four (4) times a year: January,

April, July, and October. United Way reserves the right to change the timing of payments or allocation amounts if unpredicted pledge loss occurs.

### Agency Responsibilities

1. Campaign Participation – As a **participating agency** with UWEC, the agency will support and participate in the UWEC campaign as much as possible. This includes but is not limited to:
  - a. Attending and participating in events and fundraisers.
  - b. Providing service and program data, photos, and human interest stories to be used for the campaign.
  - c. Providing staff, volunteers or clients to speak to donor groups.
  - d. Arranging tours for volunteers, donors and potential donors, at times that do not interfere with the operation of the agency’s program.
  - e. Allowing UWEC to use photos and videos of program facilities, volunteers and staff in promotional materials for the campaign.
  - f. Sharing suggestions and insights to improve the overall campaign.
  - g. Giving agency staff, Board members, and volunteers the opportunity to contribute to UWEC, including but not limited to payroll deduction campaigns, donation jars, ‘Jeans Days,’ etc.
2. Fundraising – The agency agrees to:
  - a. Avoid direct solicitation of funding to individuals and businesses in September and October unless otherwise approved by the Board of Directors. All requests should be made in writing using form UWEC-Fundraising 12-14. In the event, an agency neglects to submit Fundraising during Blackout Exemption form prior to the commencing fundraising activities, agency will receive a 1% reduction in their upcoming disbursement. Agencies requesting to do a fundraiser during the blackout period may be subject to donating 10% of their profits to United Way of Eddy County.
3. Agency Identification and Co-Marketing – The success of the UWEC campaign depends upon public recognition of its funded programs. The agency thus agrees to identify itself clearly as a **participating agency** of UWEC in its communications, including but not limited to:
  - a. Printed documents, such as newsletters, press releases, letters, billboards and other material.
  - b. Electronic communications, such as websites.
  - c. Broadcast communications, such as television or radio spots and programs
  - d. The agency offices will display the United Way logo.
4. Reporting Requirements - The agency will report the information outlined below.
  - a. All information contained in the application, including copies of yearly financial reports – 990, audits, budgets, etc.
  - b. The agency will inform UWEC of significant changes to its program or its ability to carry out its mission, especially as they relate to programs funded by United Way.
  - c. The agency will participate in United Way Participating Agency meetings.
  - d. The agency will provide UWEC with written mid-year and year-end reports by the due date that provides an update on how the agency is progressing towards meeting outcomes from the Logic Model submitted. Each agency is also required to submit a quarterly financial report. The report should include a Balance Sheet, Statement of Income & Expenses, and Budget vs. Actual for the program money is granted. (If Quick books is the accounting system used, a print out of these reports is acceptable and no other form is needed.) ALL reports should be submitted electronically. All reports are due by the 15<sup>th</sup> of January and July. Reports that are received by the deadline, will have their allocations payment processed within 15 business days.
5. Any money not expended within the guidelines established or not expended during grant period of January 1- December 31 with ample time for program to be facilitated, in excess of 10%, must be returned to United Way. The Allocations Committee will review all reports and communication will be made with **participating agency** if there are any concerns with expenditures incurred. If the Allocations Committee recommends to the Board of Directors that money be returned and the Board of Directors agree, **participating agency** must return any unspent or money not spent according to the budget within 30 days.
6. Accountability – UWEC is accountable to its donors. Therefore, the agency must agree;

- a. To obtain and maintain all necessary federal, state or local licenses or permits.
- b. To maintain a responsible management, governing body and staff to administer its programs and/or services.
- c. To cooperate with other human service agencies, both public and private, in preventing duplication of efforts and in promoting efficiency and collaboration.

**Sanctions:** Should **participating agency**/program violate this agreement, the sanctions listed below may be imposed after review by the United Way Board of Directors. It is the intent of the Board to assess the nature of the violation and issue sanctions that correspond to the severity of the violating action. Upon the offense, United Way may act in any of the following manners.

- a. United Way will notify the agency in writing and within two (2) weeks the agency shall submit in writing, a corrective action plan that ensures United Way the offense will not reoccur.
- b. No additional funds will be release to the agency for the remainder of the calendar year.
- c. Funds will not be distributed to the agency in future years unless the United Way Board approves.
- d. The agency violating part of this agreement will not be allowed to apply for funding in future years unless the United Way board approves.
- e. Termination of all affiliation.

**Termination:**

1. The agency may terminate this agreement and withdraw from its affiliation with UWEC by providing a 30 day written notice to the Board of Directors of UWEC stating the reason(s) for withdrawal. UWEC funding will cease upon the effective date of termination. Funds intended for use after date of termination shall be returned to UWEC within 30 days of termination.
2. UWEC reserves the right to withhold, adjust or cancel allocation payments as well as de-fund programs based upon the UWEC’s Board of Directors determination of an Agency’s failure to comply with the terms of this agreement.
3. An organization may appeal its termination to the UWEC Executive Committee. The United Way Executive Committee will submit its recommendation to the Board of Directors for a final decision.

**The terms of this agreement have been reviewed and accepted by UWEC and the Organization, with the authority of their respective Board of Directors. (Participating Agency Director and Board President must sign)**

**Participating Agency:**

\_\_\_\_\_  
Signature and Date

\_\_\_\_\_  
Name and Title (please print/type)

\_\_\_\_\_  
Signature and Date

\_\_\_\_\_  
Name and Title (please print/type)

**United Way of Eddy County Executive Director:**

\_\_\_\_\_  
Signature and Date

## **Diversity and Inclusion: A Statement of Principle**

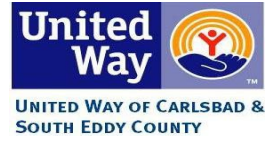
The United Way Board of Directors recognizes diversity and inclusion as core values that are critical success factors in achieving United Way's mission. This is a business imperative that is required for United Way to grow, thrive and advance the common good in our community.

The Board of Directors, staff, and volunteers must reflect all of the many faces, and walks of life, that proudly make up our community. Together we genuinely demonstrate the principles of diversity and inclusion which enrich our community.

To value diversity is to respect and appreciate race, religion, skin color, gender, nationality, language differences, sexual orientation, gender identify, physical, mental and developmental abilities, age, socioeconomic status, work and behavioral styles, parental status and the perspectives of each individual shaped by their nation, culture and experiences. To be inclusive is to leverage diversity by bringing together unique individual backgrounds to collectively and more effectively address the issues facing our community.

It is our aim, therefore, that the United Way of Eddy County system's strategies, investments and partners reflect these core values. Diversity and inclusion are at the heart of what it means to live united and advance the common good; to be a diverse and inclusive system is fundamental to achieving our mission and goals.

# Funding Strategies Acknowledgement



Agency Name: \_\_\_\_\_

By signing below, I acknowledge that I have received the United Way of Eddy Counties Funding Strategies packet and it has been reviewed with me by the executive director. All my questions have been satisfactory answered. Should I need additional support in understanding the Funding Strategies, I will contact the executive director in writing by email at [director@uweddyco.org](mailto:director@uweddyco.org).

Sign and Date:

\_\_\_\_\_  
Participating Agency Director Signature

\_\_\_\_\_  
Participating Agency Board President Signature

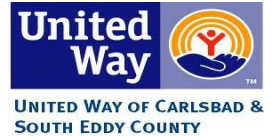
\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name



# DIRECT SOLICITATION FUNDRAISING EXEMPTION REQUEST

(Form: Fundraising 12-14)



Agency Name: \_\_\_\_\_

Agency Address: \_\_\_\_\_

Executive Director/Agency Contact: \_\_\_\_\_ Phone # \_\_\_\_\_

United Way **participating agencies** are to avoid direct solicitation of funding to individuals and businesses in September, October and November unless otherwise approved by United Way of Eddy County. To request an exemption to this requirement, complete this form in its entirety. Requests should be made at minimum of 60 days in advance by submitting form to [director@uweddyco.org](mailto:director@uweddyco.org). All requests will be evaluated and a determination letter will be forwarded within one month of submission.

## PROPOSED ACTIVITY OR EVENT INFORMATION:

Date: \_\_\_\_\_

Place: \_\_\_\_\_

Time: \_\_\_\_\_

Specific Theme: \_\_\_\_\_

Specific Details:

What will funds earned be used for:

**Must this event be held in September or October?** YES NO If so, please explain:

\_\_\_\_\_  
Participating Agency Director Signature & Date

\_\_\_\_\_  
Participating Agency Board President Signature & Date

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

United Way of Eddy County Executive Director:  
  
\_\_\_\_\_  
Signature and Date

United Way Use Only: Amount currently funding agency: \$ _____ Current on reports? Yes No Subject to 10% donation of profits? Yes No
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# United Way of Eddy County

## Budget Change Request - (Form Budget 12-14)



**AGENCY NAME:** \_\_\_\_\_ **FUNDING YEAR:** \_\_\_\_\_

Community Impact Funding can only be used for budgeted items included in the approved grant application for the program specified. Approval is needed from the Board of Directors for any budget line item change in excess of 10%. Budget must still balance in accordance with the funding allocated to the participating agency. Email completed form to: [director@uweddyco.org](mailto:director@uweddyco.org) **before** the expenditures are incurred. Request must be signed by participating agency Director, Board President/Chair, and Board Treasurer.

LINE ITEM EXPENSE DESCRIPTION	ORIGINAL BUDGET SUBMITTED	BUDGET INCREASE OR DECREASE	REVISED BUGET AMOUNT	REASON FOR CHANGE
Staff specific to facilitate program	\$ -	\$ -	\$ -	
Administration staff to support this project:			\$ -	
Office Supplies:			\$ -	
Advertising/Printing:			\$ -	
Travel:			\$ -	
Dues/Subscriptions:			\$ -	
Occupancy:			\$ -	
Professional fees:			\$ -	
Equipment specific to this program/project:			\$ -	
Supplies specific to this program/project:			\$ -	
Other:			\$ -	
Other:			\$ -	
<b>TOTAL:</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	

Signature: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

United Way Use Only:

## United Way of Eddy County Fundraising During Blackout Period Campaign Contribution Form



**AGENCY NAME:** \_\_\_\_\_ **FUNDING YEAR:** \_\_\_\_\_

Please submit this form and check within 45 days of fundraising event to the United Way Office at PO Drawer EE Carlsbad, NM 88221 or hand deliver to 116 S. Canyon St.

Fundraising Event Date: \_\_\_\_\_

Total Income:	\$
Total Expenses:	\$
Total Profit:	\$
Total United Way Contribution (10% of Profits):	\$

Form must be signed by Executive Director, Board President and Treasurer.

Signature: _____	Title: _____	Date: _____
Signature: _____	Title: _____	Date: _____
Signature: _____	Title: _____	Date: _____

United Way Use Only:

Check # \_\_\_\_\_

Date Received: \_\_\_\_\_

Questions should be directed to: [director@uweddyco.org](mailto:director@uweddyco.org)