

Start Application

Congratulations! Based on your responses to the checklist and intent to submit, you have been invited to submit a full application for further consideration. Please click on the link below to begin the application process by starting a new application. You only need to click on this link once to create your new application. Go to "My applications" to access your new application and dashboard after you have clicked on the below link. **DO NOT** create more than one NEW application per program. As stated before, go to "My Applications" and the newly created application, along with any information you have filled out within the NEW application, will be waiting for you!

If you wish to create an application to start the process, select the "click here" link to the right.

[Click here](#)

Organizational Information

Save your work as you go!!

You have the option to save your work and submit the application at a later time. Although each section has Auto Save, please be sure to click the "Save" button at the bottom of the section to save your work. There is a time-out feature for security purposes. If the page remains idle for 20 minutes, it will not save your work, and will require you to log back in.

*Please complete the required fields. You may save and return to the application dashboard by clicking **Save and Return to Application**. You can return any time to complete the process.*

*Indicates required field

Updated Information Section

*

Does this organization have any documents that were provided during the pre-qualification phase that need to be updated? (Documents can include a 990 that was submitted after the 5/27 pre-qualification deadline, or a 990 filed later due to an extension granted by the IRS; an updated registration letter from the Office of the Secretary of State that was received after the 5/27 pre-qualification deadline or due to an extension granted on the 990; a Strategic Plan or By Laws that were reviewed or approved by your Board of Directors after the 5/27 pre-qualification deadline).

Yes No

Please explain why the documents you provided in the pre-qualification phase need to be updated (I.E. Filed an extension with the IRS and submitted after the pre-qualification deadline) (300 words max)

This box is to be used to explain why you are attaching any additional documentation. (EXAMPLE: We filed for an extension of our 990, and have recently submitted our 2021-990, which is attached) This section IS NOT required. However, if you had any documents that have changed between the prequalification deadline (5/27) and the application process (now), they need to be provided here.

Please attach the updated information:

 Browse...

Please attach the updated information:

 Browse...

Please attach the updated information:

 Browse...

Please attach the updated information:

 Browse...

Overall Organization Information

*United Way of the Lowcountry embraces the need for every community to address Racial Equity. Many organizations have implemented internal policies on Racial Equity and/or Diversity, Equity and Inclusion (DEI). If your organization has implemented relevant policies, please provide below. If you have not yet, please provide your current non-discrimination policy: (500 word max)

We are asking you to "cut and paste" your organization's current policy here.

Volunteers:

* Please explain how volunteers are utilized throughout your organization, not just the program for which you are seeking funding. If volunteers are NOT utilized, please explain why (i.e. certification required, must have advanced degrees, etc.) (300 word max)

All other volunteer questions have now been moved to the metrics document. This is where you explain how you use volunteers, or why you don't.

Collaboratives/Coalitions

If you are submitting a funding request on behalf of a coalition or collaborative, it is not required to submit organizational information on the fiscal agent. We will accept the Lead agency or "backbone agency" information if it provides a clearer picture for the reviewers. Please know that United Way retains the right to request information on the fiscal agent if questions arise.

Definition – Coalition/Collaborative partnerships are agreements and actions made by consenting organizations to share resources to accomplish a mutual goal. Collaborative partnerships rely on participation by at least two parties who agree to share resources, such as finances, knowledge and people.

*
Are you submitting a funding request on behalf of a collaborative or coalition?

Yes No

Please scan all Memorandums of Agreement/Understanding as one document and upload. Please remember, if you are submitting as a collaborative you **MUST** attach your MOA/MOU (*letters of support are not acceptable*):



Has research been done to ensure this collaborative is **Not** a duplication of efforts? Please list any collaboratives currently in operation that you have researched, that provide similar services, and explain how your collaborative is different: (300 word max)

Please describe your collaboration in detail, including expected participants, their roles, and goals of the partnership: (300 word max)

Organizational Finances

*
Organization's overhead percentage: Please use the calculation and number you provided in the pre-qualification phase of this application **UNLESS** you provided updated information at the beginning of this section that would impact your overhead percentage. I.E. you filed an extension with the IRS and have attached your updated 990.

Financial Report, Review, or Audit

Please upload your most recent financial report, 3rd party review, or 3rd party audit, which is dependent upon the budget thresholds found below. Financial reviews, reports, or audits provided must be the most recent and within the last 12 months:

Browse...



- **Gross Annual Revenue Up \$300,000:** Audit committee assigned by the governing board to issue **a financial report** in a format approved by United Way of the Lowcountry, Inc. and signed by at least three members of the agency's board.
- **Gross Annual Revenue From \$300,001 to \$750,000:** Independent Certified Public Accountant to issue **a review** that conforms to generally accepted accounting practices for voluntary health and welfare organizations.
- **Gross Annual Revenue From \$750,001 and above:** Independent Certified Public Accountant to conduct **an audit** that conforms to generally accepted accounting practices for non-profit voluntary health and welfare organizations.

If an audit is required, please make sure you scan the management letter WITH the copy of the audit. If there were any findings reported, it is also necessary to scan the Board approved action plan for addressing those deficiencies. All components need to be scanned together, as one document, for upload.

Organizational Budget

Please explain any unusual or distinctive characteristics of your organizational budget you wish the program reviewers to know before they begin evaluating.

*This is your opportunity to put your operational budget into context. **If there are significant variances (+ or - 10%) between the current and proposed fiscal years, make sure to explain them to the reviewers in this section. Please make sure to identify the line item number in the budget that the variances are describing.** It can also be used to provide detail as to why this budget doesn't match other financial documents you have submitted, to elaborate on surpluses or deficits if not using a zero based budget, to explain your program's cost allocation process, or for anything else in this budget you feel needs explanation. (300 words max.):*

This section can be used to talk about timing issues your organization might experience, or those reimbursable grants that play havoc when you put your budgets on paper, or ANYTHING that helps reviewers that do not "live in your forest" understand what it is they are reviewing. When questions about budgets are answered ahead of time, application scores tend to be higher.

Please **download** the template for the Organizational Budget form found in the link below and upload it after filling in all data accurately. This form must be used. Budgets provided in other formats will not be accepted or reviewed.

2023 Org budget Template - protected.xls

Keep in mind this is an operational budget and should NOT have any depreciation costs represented. The reviewers are instructed that the attached budget might not tie back to the financials provided.

Please upload the completed Organizational Budget form here. ***In order to ensure reviewers can easily read the budgets provided, please make sure to view the document before saving it as a PDF:***

 Browse...

*

Please explain how any budget shortfalls/surpluses will be handled and what impact it will have on the program for which you are requesting funding (100 words Max.):

Please do not just say "shortfalls will be handled by extra fundraising or surpluses will be reinvested. The reviewers want to know specifics.

EXAMPLE: Our policy is to handle any shortfalls, up to \$25,000, through our reserve account. If additional funding is needed, the amount of direct assistance provided per family will be reduced.

OR

Surpluses would be reinvested to program X in order to increase the number of books provided to each participating family.

Balance Sheet:

Balance sheets provide a snapshot that summarizes the status of an organization's finances at a given time.

A nonprofit organization is one that gives its profits or surplus funds to a particular cause/program, rather than distributing them to owners or shareholders like a for-profit company.

Basic Balance Sheet Features

1. Assets owned by the organization. This list will usually include both fixed assets (tangible, long-term assets that cannot be easily liquidated or converted to cash) and current assets (easily liquidated assets that are expected to be sold in the near future).
2. The next section of the balance sheet lists liabilities, which are obligations or claims against the assets of the company.
3. The difference between the assets and liabilities is listed on the balance sheet as net assets.

*

Please upload your organization's most recent, Board approved Balance Sheet:

 Browse...

Statement of Financial Activity:

An Organization's Statement of Financial Activity is one of the main financial statements of a nonprofit organization. This financial statement reports the revenues and expenses and the changes in the amounts of each of the classes of net assets during the period shown in its heading. This statement is issued by a nonprofit instead of the income statement issued by a for-profit business.

*

Please upload your organization's most recent, Board approved Statement of Financial Activity. This information MUST correlate with the above requested Balance Sheet. UWLC does not require that a standardized format be used. However, this document must contain actual year-to-date financial information compared to budgeted year-to-date information:

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Reserve Account:

In the simplest terms, organizations should have **reserves** for the same reasons that people should have savings: to serve as a cushion against unexpected but necessary expenses or a sudden loss of income, and to build up money for long-term goals and future plans.

*
Does this Organization currently have a reserve account(s) established?

yes no

If your Organization **does not** have a reserve account, please explain why and if there are plans to establish one in the future. (500 word max)

*
How much is currently in your reserve account(s)? *If the organization does not have a reserve account, please enter 0.*

*
If the word "reserve" is not used as the name of the account, please specify the name or journal number represented in your attached balance sheet where your organization's reserves are held:

*
Please provide your Board's policy on how much should be held in reserves and when the reserve account(s) can be accessed:
(300 word max)

Be specific, cut and paste from your policy.

EXAMPLE of a reserve policy provided in a past application:

Agency ABC shall hold funds in reserve to provide funding should an extraordinary event occur where the economic impact requires funds beyond what is currently budgeted and otherwise available to fund the organization. An extraordinary event could be, but would not be limited to, an event such as a natural or man-made disaster. The target balance for these reserve funds shall be 3 months operating expenses. These funds shall be made available for borrowing to fund the organization's short term cash flow needs of a term not to exceed 90 days (in lieu of utilizing line of credit).

Execution of such borrowing will be contingent on the approval of the Treasurer's Committee of the Board of Directors. If the organization cannot repay such borrowing after 90 days, the line of credit will be utilized or the Treasurer's Committee must approve any decision not to repay the reserve investment account with subsequent Board affirmation. Utilization of the funds for any purpose other than short term borrowing will require approval by the Treasurer's Committee in 3/4 majority of the Executive Committee of the Board of Directors.

Program Information

Save your work as you go!!

You have the option to save your work and submit the application at a later time. Although each section has Auto Save, please be sure to click the "Save" button at the bottom of the section to save your work. There is a time-out feature for security purposes. If the page remains idle for 20 minutes, it will not save your work, and will require you to log back in.

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*Indicates required field

Program Overview

*

Overall Program Budget:

(This should be the same amount as found on line item #29 in your Program Budget.)

*

Grant Amount Requested:

*This is the amount your Organization is requesting for the first year of the grant

*Program Name:

*

What percentage of the overall Program Budget does this grant request represent?

If the funding request above exceeds 30% of the program budget, a plan needs to be provided detailing how program sustainability will be achieved by the end of the funding cycle. If the request exceeds 30% and a sustainability program is NOT provided, the grant request will be adjusted accordingly.

Please upload the program sustainability plan **IF** the funding request exceeds 30% of the program budget.

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*

Will this program accept partial funding?

Yes No

*

If you were to receive a percentage of your funding request, explain in detail how your program would be impacted:

(300 word max)

EXAMPLE: The 1st impact would be a reduction in the number of books we provide to our participating families. If further reduction in program costs are required, we would then review the number of families able to participate in the program

Statement of Need – Please provide qualitative and quantitative data that supports the decision to implement the program. Make sure to include local data to support the need for your program (Max. 300 words)

It is great to include national statistics to put it into context, but you MUST be able to drill down to the local level. You need to be able to show that this program is needed in Beaufort/Jasper counties

*
Program Description – Please provide a description of your program from point of contact through service delivery (Max. 300 words):

This is where you explain to the reviewers what the program IS. Remember...this might be the first time the reviewer has ever heard about your program, so make sure to take this opportunity to explain about your eligibility criteria and intake process, your program components, and service provision.

*
Program Participants: Who does your program serve? Please be specific (Max. 300 words):

Demographics of your program participants. Who is the target population your program is trying to serve?

*
Key Stakeholders and/or Collaborators – Please list Key Stakeholders of your program, as well as list collaborations of which you are currently a member (Max. 300 words):

Key stakeholder=any organization who would be significantly impacted if your services ceased.
Collaborator=any organization who you have formally agreed to share resources (time, money, or staff) with.
The reviewers want to know who is impacted by your program, above and beyond the program participants.
Additionally, reviewers are able to determine whether you are operating in a silo or whether you are working with other organizations towards the common goal.

Impact

Number of people impacted by your program – Please indicate below the number of people being directly and indirectly impacted by this program. EXAMPLE: Directly impacted = program participants / Indirectly impacted = family members who might also benefit from the services received by the program participant.

*
Please provide a brief explanation of who you have included, and the rationale as to why you feel they are the indirect beneficiaries of your program. (300 word max)

Since this question was asked at almost every site visit, it was apparent that how agencies determine the indirect impact number needed some explanation. There is room for inferences to be drawn...we will jump with cause...but no leaps, PLEASE

Current Fiscal Year (Right Now)

People directly impacted:

*

People indirectly impacted:

Proposed (what is projected to happen in the next fiscal year)

*

People directly impacted:

*

People indirectly impacted:

Program Efficiency

*

Program Efficiency – Please describe what unit is being measured (an individual, a program session, a meal, a GED, etc.) Make sure the unit you are measuring aligns with the common Key Performance Indicators (KPI's) list (Max. 50 words):

This is NOT the place for creative accounting. Don't make reviewers break out the calculator to determine how much it costs per child to attend your aftercare program because you feel the program efficiency looks better by calculating the number of sessions as opposed to the cost per child.

Current Fiscal Year (Right Now)

*Number of units:

*Program cost:

 \$

Average cost per unit(s):

 0

Proposed (what is projected to happen in the next fiscal year)

*Number of units:

*Program cost:

Average cost per unit(s):

(Program cost should be the same amount as found on line item #29 in your Program Budget.)

Program Budgeting Information

Match funding - Many governmental grants provide a portion of the total funds necessary to operate a project, but require recipients to match the funding with local support in order to receive the award. EXAMPLE: A federal grant might provide a \$200,000 grant that is contingent upon the organization being able to secure a 10% (\$20,000) local match.

*

Will the United Way funding be used to "draw down" federal or state grants, allowing you to leverage resources for our area?

Yes No

If yes, what is the amount of federal dollars you will be able to "draw down"?

What is the amount of local match required?

Program Budget

Please explain any unusual or distinctive characteristics of your program budget you wish the program reviewers to know before they begin evaluating.

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Please download the template for the Program Budget form found in the link below and upload it after filling in all data accurately. This form must be used. Budgets provided in other formats will not be accepted or reviewed.

[2023 Program Budget Template -protected.xls](#)

Keep in mind this is an operational budget and should NOT have any depreciation costs represented. The reviewers are instructed that the attached budget might not tie back to the financials provided.

*

Upload the completed Program Budget form here. **In order to ensure reviewers can easily read the budgets provided, please make sure to view the document before saving it as a PDF:**

!

*

Please explain how any budget shortfalls/surpluses will be handled. (Max. 100 words):

Please do not just say "shortfalls will be handled by extra fundraising or surpluses will be reinvested. The reviewers want to know specifics.

EXAMPLE: Our policy is to handle any shortfalls, up to \$25,000, through our reserve account. If additional funding is needed, the amount of direct assistance provided per family will be reduced.

OR

Surpluses would be reinvested to program X in order to increase the number of books provided to each participating family.

Staff Salaries/FTE Form

Please download the template for the Staff Salaries/FTE form found in the link below and upload it after filling in all data accurately. This form must be used. Salary budgets provided in other formats will not be accepted or reviewed.

[2023 Program FTE-Staff Salaries - protected.xls](#)

Upload the completed Staff Salaries/FTE form here. **In order to ensure reviewers can easily read the budgets provided, please make sure to view the document before saving it as a PDF:**

Goals Outcomes and Indicators for Education Programs

Save your work as you go!!

You have the option to save your work and submit the application at a later time. Although each section has Auto Save, please be sure to click the "Save" button at the bottom of the section to save your work. There is a time-out feature for security purposes. If the page remains idle for 20 minutes, it will not save your work, and will require you to log back in.

Please complete the required fields. Please ensure that your contact information is correct. We will use this information to contact you, if needed. You may save and return to the application dashboard by clicking **Save and Return to Application**. You can return any time to complete the process.

*Indicates required field

Program Goals, Outcomes and Key Performance Indicators for Education

*Our goal is to verify the ability of your tool to track the appropriate data for the outcomes and goals that you have selected on the metrics document. If you use a proprietary or internal database system as your measurement tool, please take a screenshot or snippet, and exclude any sensitive/confidential information. Please scan and upload a copy of the tool you will be using to measure impact of your program. If more than one tool is used, please scan and upload as one document:

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*Data Measurement Process - Please explain the process that will be used to track the data requested below. Please include who the tool is being administered to, when it is being administered, and the frequency. (300 word max)

For data measurement, the reviewers need to know the tool(s) is being implemented effectively. You can have the BEST tool, but if the process isn't sound, it can skew the data.

EXAMPLE: You have a food pantry and you survey your participants. The timing of the survey could render an otherwise excellent data tool useless IF you are surveying at the beginning of the month (when they still have food stamps).

Please download the template to provide your program's goals, outcomes and key performance indicators for Education:

2023 Education Metrics.xls

*Once you have completed the above template for goals, outcomes, and KPI's, please upload the **EXCEL workbook** here:

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Marketing and Success Stories

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*Indicates required field

****NEW** Agency Logo**

*Please upload your agency logo here (image or PDF):

Success Stories

Please know that all stories and photographs provided could be used by United Way's Marketing and Communications department. All stories and photographs MUST be accompanied by a signed release form, providing permission to use the story and any images that you provide. A template can be found below:

[Media Release Form \(Community Impact - Partner Agencies\) \(002\) \(9\).pdf](#)

Please share two qualitative stories below, about how your program has improved the lives of your program participants. This is your chance to describe the outcomes your program is able to achieve and to bring your program to life for the reviewers. Be as descriptive as possible and **make sure the stories you provide tie back to the outcomes you selected in the previous section:**

*

Please upload the signed release form:

*

Story #1 (Max. 500 words):

This is your opportunity to bring your program to life and to tug at the heartstrings of the reviewers. This application process tries to make a largely subjective process quantifiable, but this section allows you to provide qualitative data that shows reviewers the "real" reason you do what you do...The "true" impact of your work.

You have the option to upload two photos that might help tell this story. You can scan the photos and upload as a PDF or you can upload as an image:

Additional Image:

*

Please upload the signed release form:

*

Story #2 (Max. 500 words):

This is your opportunity to bring your program to life and to tug at the heartstrings of the reviewers. This application process tries to make a largely subjective process quantifiable, but this section allows you to provide qualitative data that shows reviewers the "real" reason you do what you do...The "true" impact of your work.

You have the option to upload two photos that might help tell this story. You can scan the photos and upload as a PDF or you can upload as an image:

Additional Image:

Application Final Approval

This section should be the last one to be completed so that the Executive Director and the Board Chair can go into the application and review all documents for accuracy and quality BEFORE submitting.

Application's Final Approval by the Executive Director and the Board Chair

ELECTRONIC SIGNATURES:

The parties acknowledge that this agreement may be electronically signed. The parties agree that the electronic signatures found below are the same as handwritten signatures for the purposes of validity, enforceability and admissibility.

STOP!

Please DO NOT electronically sign before you have conducted a thorough review of the application and documents attached. If the wrong documents are provided, it could result in being deemed ineligible to receive funding.

*

Executive Director (If submitting as a collaborative, the backbone agency's Executive Director):

I do hereby state that this document is submitted with the full support of the governing board. I have reviewed and approved this entire application, including all information and documents submitted by my collaborators.

Yes

*Executive Director/Backbone Agency's Executive Director Signature:



Please click on the calendar icon to enter date in (MM/dd/yyyy e.g., 06/27/2022 format).

STOP!

Please DO NOT electronically sign before you have conducted a thorough review of the application and documents attached. If the wrong documents are provided, it could result in being deemed ineligible to receive funding.

*

Board/Collaborative Chair:

I do hereby state that I have reviewed this document and all attachments for accuracy and quality.

Yes

*Board/Collaborative Chair Signature:

*Date:



Please click on the calendar icon to enter date in (MM/dd/yyyy e.g., 06/27/2022 format).