**Agency Application Checklist 2022**

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| **Actions to Complete With Application** | **Completed** |
| **Attended Training** |  |
| **Submitted Intent to Apply (BY 4pm March 18, 2022)** |  |
| **Confirmed or Created Username and Password for Online** |  |
| **Completed and Submitted Mid-Year Report (for Current Agencies ONLY - By 4pm April 14, 2022)** |  |
| **Scheduled Time with UWCC, if needed** |  |
| **Scheduled Time with SCORE mentor, if needed** |  |
| **Completed and Submitted Grant Application (BY April 14, 2022)** |  |
| **Dropped off Master Paper Copies to UWCC office (By 4pm April 14, 2022)** |  |
| **Information Needed for Online Application** |  |
| Organization Name as listed on IRS determination letter |  |
| Organization’s EIN |  |
| Agency Mission Statement |  |
| Agency Website Address |  |
| Date of board signature on most recent 990 |  |
| Percentage of administrative and fundraising expenses for your last fiscal year |  |
| Number of years agency has been serving Charlotte County |  |
| Number of Paid Staff |  |
| Number of Volunteers & Volunteer Hours |  |
| Total Program Budget amount |  |
| Program Outcomes |  |
| List of your agency’s Outreach and Partnerships |  |
| Final Program Report for the 2020-2021 Grant Cycle |  |
|  |  |
| **Documents Needed for Uploading** |  |
| Agency Organizational Chart |  |
| Agency Board of Directors List |  |
| Agency Strategic Plan most recent |  |
| Agency Budget |  |
| Success story for your program (can be uploaded OR typed into application form) |  |
| Completed Program Budget Form (1 form for each program) |  |
| Most recent Audited Financial Statements |  |
| Most recent 990 |  |
| Letters of support from non-funded partners or stakeholders |  |
| CURRENT IRS determination letter indicating 501(c)(3) tax-exempt status and public charities status |  |
| Final Program Report for the 2020-2021 Grant Cycle |  |
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|  |  |
| **Master Paper Copies** |  |
| Most recent Audited Financial Statements | 2 Copies |
| Most recent 990 | 2 Copies |

**To complete your application, follow these instructions:**

1. **Do not use Internet Explorer.**
2. Click on this link: [www.unitedwayccfl.org/user/login](http://www.unitedwayccfl.org/user/login)

**Current/Previous Users:** You will be prompted to sign in with the **USERNAME** and **PASSWORD** you have previously set up

* Usernames **are not** case sensitive, however, if you included any spaces in your username, please be sure to include those spaces when you log in.
* Passwords **are** case sensitive.

**New users:  CREATE AN ACCOUNT**

* Select the tab **Create new account**
* **We recommend using your email address as your username**. You will receive an email to set up your password.
* Usernames **are not** case sensitive, however, if you included any spaces in your username, please be sure to include those spaces when you log in.
* Passwords **are** case sensitive.

1. **IMPORTANT:**

**Only ONE person from your agency can be logged in and working on the application at a time.**

1. Be sure to save your draft periodically. **SAVE DRAFT** button is at the bottom of the page. It is recommended to Logout when you are not working on your application.
2. Before you submit, click **PREVIEW**. Review your entries and then click **SUBMIT.**
3. A PDF of the document will be emailed to both United Way and your agency.

* It will be sent to the email address that is included in the application under:
  + **General Agency Information – Email Address for Submission.**

1. As with anything, there are issues that can come up with a new form – please let us know of issues or questions.

If you need help logging in to complete the application, contact Jen Coalwell - [admin@unitedwayccfl.org](mailto:admin@unitedwayccfl.org)

For questions about the content of the application, contact Jennifer S. Sexton [impact@unitedwayccfl.org](mailto:impact@unitedwayccfl.org)