



Important Allocation Application Information

Completed applications must be turned into the United Way office by 12:00pm on January 31, 2024.

Previous years progress reports for each agency must be completed and submitted to our office by January 17, 2024 for new applications to be considered.

- **A list of commonly asked questions are available on our website under the Allocation tab.**
 - www.beaverheadunitedway.org

Open office hours will be held on the following dates for questions and assistance with completing applications.

Thursday	January 11 th	11am- 1pm
Tuesday	January 16 th	11am- 1pm
Thursday	January 18 th	11am- 1pm
Thursday	January 18 th	5pm- 7pm
Thursday	January 25 th	11am- 1pm
Thursday	January 25 th	5pm- 7pm
Tuesday	January 30 th	11am- 1pm

If you have any questions, please do not hesitate to reach out!

Ashly Cottom

Allocations Chair
406-683-4269
Info@beaverheadunitedway.org

2024 United Way Application

Application information

Agency Name:

Date:

Mailing Address:

Street address

Apt./Unit #

Phone:

City

State

Zip Code

Email:

Agency Contact:

Phone:

Email:

Website:

Does your agency have a board of Directors?

Yes

No

Are your meetings open to the public?

Yes

No

How many paid employees and volunteers do you have?

Full Time:

Part Time:

Volunteers:

List dates, times, and places of meetings for 2024:

Organization Information

Your organization's mission statement:

Describe your organization and the services you provide.

What year was your organization started and why?

Organization Information Continued...

How is need and eligibility determined for your services?

What are the main obstacles that stand between you and your mission? How do you plan to overcome them?

Are there any other agencies that offer the same type of services? How do you avoid duplicating services?

Do you have a waiting list for your services beyond the organization's capacity?

Yes

No

Do you charge a fee for program services?

Yes

No

If yes, attach fee schedule.

501 (c)(3) and Financial Information

Is agency an approved
501(c)(3)?

Yes No

EIN: _____

If no, explain:

What type of 990 does your agency file?

990-N

990-EZ

If you are not required to file a 990, you are still required to provide financial information.

Is your organization/ project under the umbrella of another
principal non- profit agency?

Yes

No

If so, please explain.

What other types of fundraising are you pursuing? Have you applied for other grants?

Previous Year's United Way Funding

Do you have any remaining United Way grant money?

Yes

No

If so, please explain.

How many community members were impacted by your project(s)?

Please explain how your previous year's project impacted the community.

How did you measure the impact of the project? What are your tracking methods? Did it meet intended goals?

Proposed projects must benefit the Beaverhead County community in the following areas:

Education

Helping the members of our community achieve their potential through educational opportunities, high quality childcare programs, develop healthy habits, and support all levels of education.

Economic Stability

Empowering our community members to move toward financial independence, increase financial literacy and income levels. Also help to stabilize families and achieve success in the workforce.

Health

Working to ensure every member of our community has access to affordable and quality health care and to programs that increase health and wellness. Also, programs that reduce risky behaviors for youth and adults.

Community Impact

Changes to our community that leave or support a lasting positive impact and improve the well-being of children, youth, and families.

Project Descriptions

Provide 2-3 projects for our board of directors to consider.

1. Fill out a description for each project and indicate their priority to your organization.
2. Explain how the project will benefit our community based on the criteria above.
3. Be as detailed as possible for each question, include extra sheets if needed.

UWBC grant funds cannot be used for the following:

- Salaries or wages
- Administrative or overhead costs
- Capital campaigns or building/ remodeling projects
- Fundraising, religious, or political events
- Attendance of conferences or workshops

*Exceptions may be made on a case-by-case basis.

Project 1 Funding Request

Project Description:

Why should UWBC fund this project?

Project 1 Funding Request Continued...

How will the community benefit from this project? How many people will be directly impacted by your project?

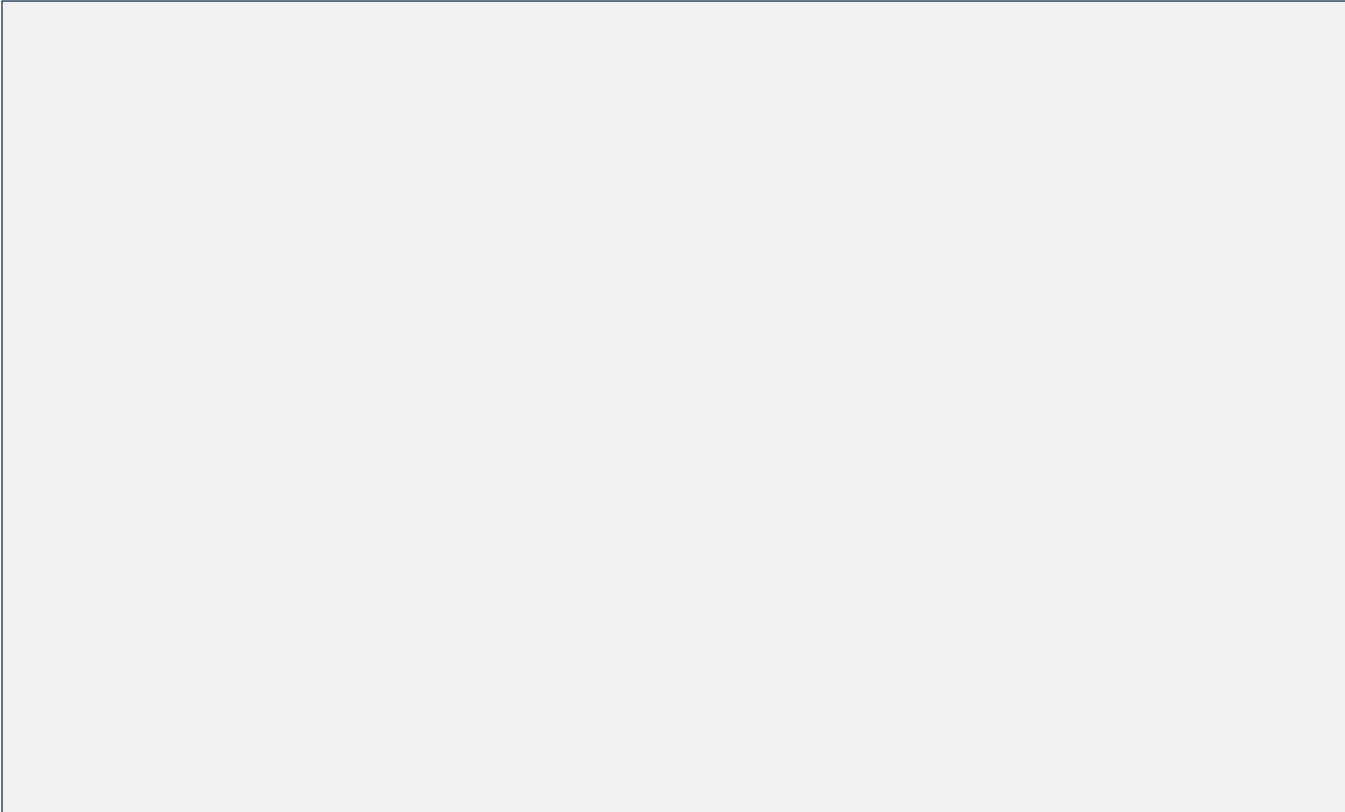
What other sources of funding will be used on this project?

Project Budget:

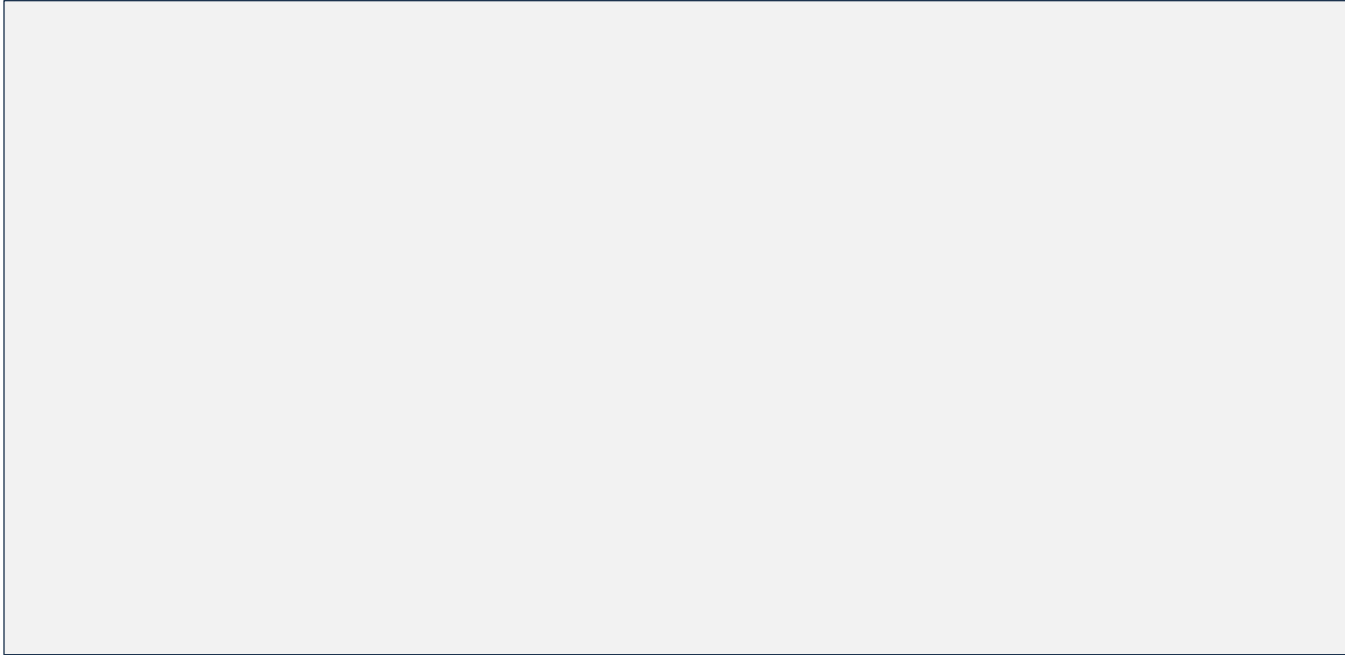
Budget Category/ Item	Total Estimated Cost	Amount Requested
1. _____	\$ _____	\$ _____
2. _____	\$ _____	\$ _____
3. _____	\$ _____	\$ _____
4. _____	\$ _____	\$ _____
5. _____	\$ _____	\$ _____
6. _____	\$ _____	\$ _____
7. _____	\$ _____	\$ _____
8. _____	\$ _____	\$ _____
Total:	\$ _____	\$ _____

Project 2 Funding Request

Project Description:

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Why should UWBC fund this project?

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Project 2 Funding Request Continued...

How will the community benefit from this project? How many people will be directly impacted by your project?

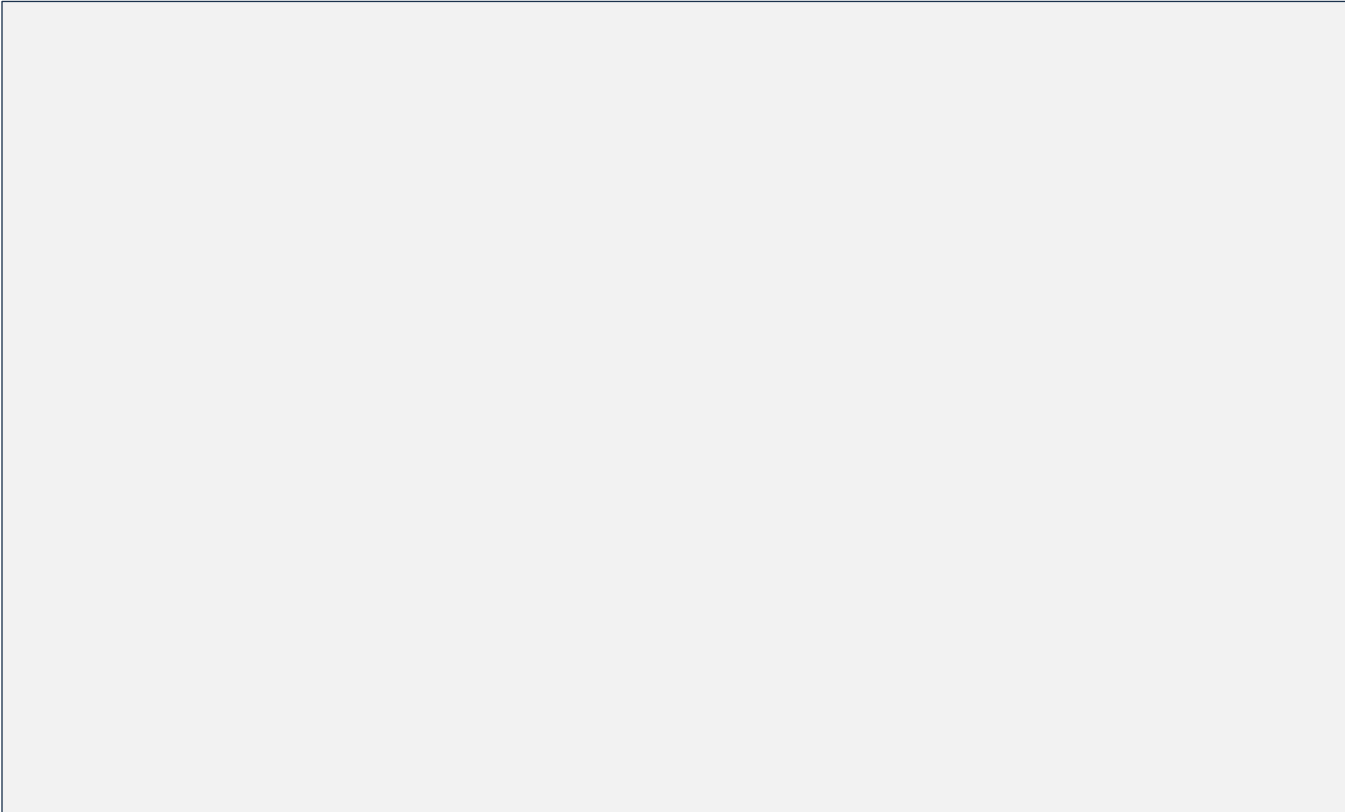
What other sources of funding will be used on this project?

Project Budget:

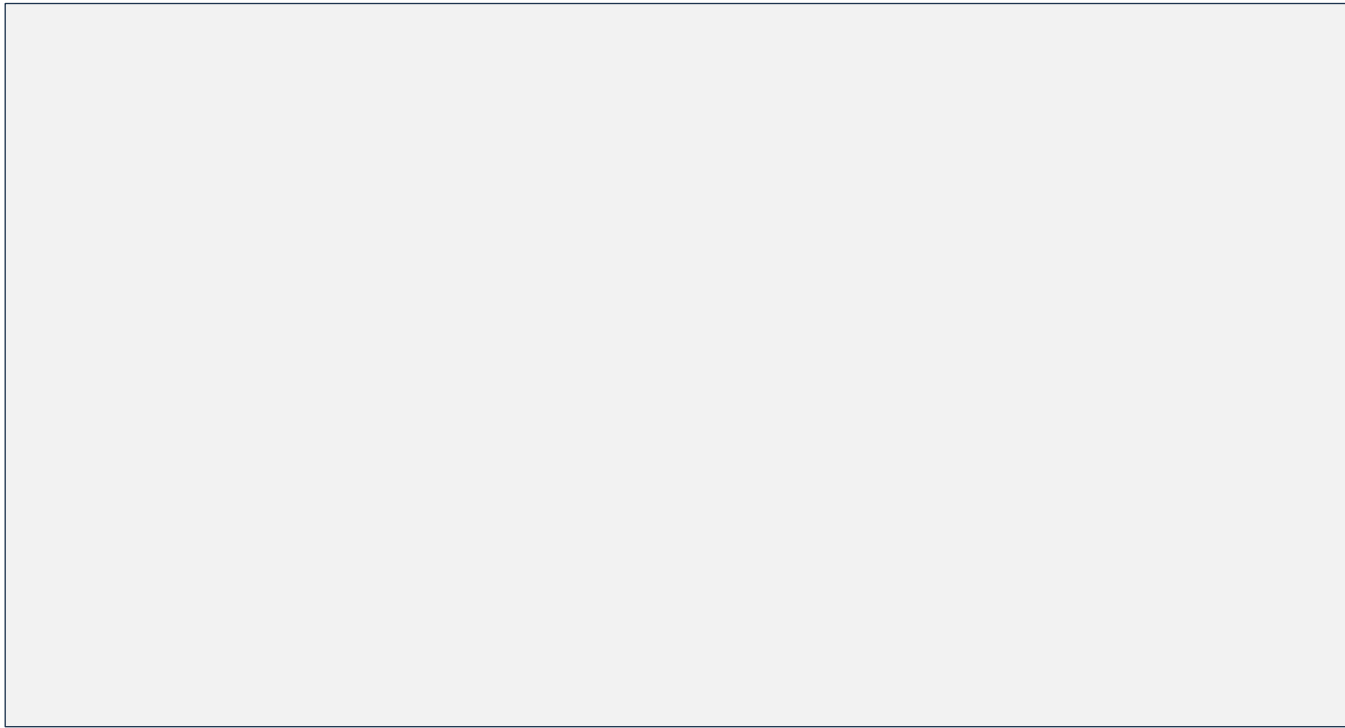
Budget Category/ Item	Total Estimated Cost	Amount Requested
9. _____	\$ _____	\$ _____
10. _____	\$ _____	\$ _____
11. _____	\$ _____	\$ _____
12. _____	\$ _____	\$ _____
13. _____	\$ _____	\$ _____
14. _____	\$ _____	\$ _____
15. _____	\$ _____	\$ _____
16. _____	\$ _____	\$ _____
Total:	\$ _____	\$ _____

Project 3 Funding Request

Project Description:

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Why should UWBC fund this project?

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Project 3 Funding Request Continued...

How will the community benefit from this project? How many people will be directly impacted by your project?

What other sources of funding will be used on this project?

Project Budget:

Budget Category/ Item	Total Estimated Cost	Amount Requested
17. _____	\$ _____	\$ _____
18. _____	\$ _____	\$ _____
19. _____	\$ _____	\$ _____
20. _____	\$ _____	\$ _____
21. _____	\$ _____	\$ _____
22. _____	\$ _____	\$ _____
23. _____	\$ _____	\$ _____
24. _____	\$ _____	\$ _____
Total:	\$ _____	\$ _____

Needed Information

In compliance with United Way Worldwide we request that each agency seeking funding provide the following:

1. Program funding application
2. Current list of board members and contact information
3. 501(c)(3) letter with Federal ID number (or tax exempt letter)
4. Current and previous years fiscal budget
5. Most recent 12 months Profit and Loss statement
6. Current and previous year's 990
7. Counterterrorism Compliance Form (last page)

We submit our 2024 Allocation Application for your approval. By signing below, we certify that the following information is true and correct to the best of our knowledge.

_____	_____	_____
Printed name of person completing the Funding request	Signature	Date

_____	_____	_____
Printed name of Board Chair	Signature	Date