**TIPS FOR COMPLETING THE
ON-LINE GRANT APPLICATIONS
AND REPORTS**
United Way of Greater Lima

1. All the forms and resources needed to complete your applications and impact reports can be found at any time on the United Way of Greater Lima (UWGL) website at https://www.unitedwaylima.org/agency-resources.

2. Community Partners are required to **submit both** an **Initial** Application at the beginning of the 3-year funding cycle, AND **Renewal** Applications in years 2 and 3. The Renewal Applications have been abbreviated to save you time, and it gives you opportunity to report on the success of your program.

3. If your agency receives funding for more than one program, please **contact Megan Pasion, Communication Coordinator, at mpasion@unitedwaylima.org for the link for the second program application**. It is abbreviated to include only program information **if** your agency completed the full application for the first program.

4. Your application/report is **not complete** until you **click on "submit", then review the form, and finally click on "confirm"**. The normal process: once completed, click on "Submit". You are then taken to a page where you can review and edit your application. After your review, you must click on the "Confirm" button that is located at the bottom of the page. You will know it has been finalized when you receive an email telling you it has been received.

5. **BEFORE you hit Confirm**, you have your only opportunity to **print a copy** of your application. (I can provide you with a copy of your application later, but it is preferable that you capture your own copy here.)

6. One shortcoming of this Forms Platform is that you can't pick up last year's application and simply update it. Some have found it to be a **time saver to type their answers into a Word document** so that next year, they can simply modify, cut and paste. However, we do expect to receive **updated information every year**. Please take time to update the information that you are "pasting".

7. Success Stories: Potential donors are moved by your stories of helping real people in difficult circumstances. We use your stories in our brochures, website, and company presentations. **Please submit a new success story each year.**

8. Document Download: please retrieve the **latest version of each form** before completing.

9. Document upload allows only **one document per item**. So, for example, you will need to save your success story and the release as one pdf before uploading.

10. When uploading documents, .**pdf format** is preferred. It is also very helpful if you **label the documents** with your agency name and document name.

11. When submitting your profit/loss statements, balance sheet, audited financials and your IRS Form 990, please **send the most recent one that is complete**.

12. Budget information: please submit the budget that you completed **based upon your agency's fiscal year**. You do not need to recreate a budget to fit the UWGL fiscal year of July 1 through June 30. A question on the application asks for you to explain your agency's fiscal year.

13. Program Budgets: we require that you **use the simple UWGL form to submit your program budget**. This is for the ease of the Community Review Panels in deciphering your financial information.

14. If your Agency requires that your IRS Form 990 be sent directly to one person, you may submit it to Megan Pasion, Communication Coordinator, at mpasion@unitedwaylima.org.

15. IMPACT REPORTS:
    a. Pay close attention to the dates being reviewed as listed on the report.
    b. A client is a person who received the services of your program
    c. Count **unduplicated** clients served at your **Allen County location**.
    d. Count only the clients served **through the Program funded** by your United Way grant.
    e. If your program/service is offered inside the schools, you may use the zip code of the school.

16. If you have any **problems with the forms** such as a problem with a password to resume the form, please give Megan Pasion a call at 419-227-6341, ext. 105.. I am able to reset passwords for partially complete applications.   (Make sure the email address of the person completing the form is accurate – this is where password information will be sent.)

17. If you submitted your application the final time and you suddenly remember you forgot to include something, please call Megan Pasion. I can **reopen applications** that have been closed so that you can go back and correct it the way you wanted.

18. **AGENCY documents** required for completion:
    a. 501(c)3 IRS Determination Letter
    b. Board of Directors list (including position, 3 yrs served, contact information)
    c. USA Patriot Act Statement of Compliance
    d. Annual Audit or Financial Review
    e. IRS Form 990 (in full) or 990EZ ((Part I – Part X only)
    f. Agency Balance Sheet
    g. Agency Profit and Loss

19. **PROGRAM documents** required for completion:
    a. Board approved program budget (using the UWGL form)
    b. One Success Story and Release