

September 2013

Dear Agency Partners:

**Re: 2014 Funding Application**

As discussed in our 2013 award letter, United Way of Long Island will begin the second year of multi-year funding beginning January 1, 2014 through December 31, 2014 at the same level as granted in 2013. This funding will be contingent upon the review of your program narrative, agency and program budgets, Form 990 and your 2012 Audited Financial Statements.

If your agency is listed on the attached page, you are required to submit this application, along with all financial data, by the close of business (5PM) on Monday, December 2, 2013. Additionally should your agency name have an asterisk next to it, you will be scheduled for a site visit this cycle. A volunteer will contact you to make arrangements that are convenient for you and the visit team after the application has been received.

The items required to be submitted for review are listed below. Please send six (6) collated copies in the order shown and either clip, staple, or rubber band each set as a single package. Do not use binders, folders or separators.

1. Cover page 1a and 1b.
2. One Page Program Narrative for the program being supported by United Way, as shown in your 2013 application, including results and number of clients served. If the program is different from 2013, you must make a notation next to the Program Name on the Narrative Page.
3. Program Budget comparing 2012 actual year end to 2013 proposed program budget (use parallel columns on same page if possible) with a breakdown of both revenue and expenses. These comparison years differ from Item 4 below.
4. Total Agency Budget comparing 2012 actual to 2011 actual year ends with a breakdown of both revenue and expenses, explaining variances greater than 10% (use parallel columns on same page if possible). These comparison years differ from Item 3 above.
5. 2012 Audited Financial Statements.
6. 2012 Form 990.
7. 2014 Partnership Agreement – signed page 5 by Agency Executive Director, Board Chairman or President and National Representative if agency is part of a National organization.

Please review the following guidelines with respect to application submissions:

- Partners that submit incomplete or inaccurate applications will automatically lose a month of funding.
  - Partners that submit the corrected information within 1 week (7 days) from the date of notification will only lose that month's base allocation.
  - Partners that submit the corrected information within 2 weeks from the date of notification will lose 2 month's base allocation.
  - After 3 weeks, the entire year's allocation will be forfeited.

It is our hope that no organizations reach these penalty levels and we will work with each of you to ensure the accurate and timely submission of your funding applications. We look forward to receiving your proposals.

Sincerely,

Sandra Mahoney  
Vice President, Community Impact

For instructions on accessing the 2014 Funding Application on our website please see the following page.



### **2014 Funding Application Instructions**

United Way of Long Island is pleased to release our Funding Application for 2014. The completed application is due in our offices at 819 Grand Blvd., Deer Park, NY 11729 by close of business (5PM) on Monday, December 2, 2013. Please use the 2014 format found on the United Way of Long Island's website at [www.unitedwayli.org](http://www.unitedwayli.org) as changes have been made.

***\*\*We strongly suggest that you read the application carefully and thoroughly when you open it, in case there are any questions.***

#### **TO ACCESS THE APPLICATION:**

- Go to [www.unitedwayli.org/user](http://www.unitedwayli.org/user)
- Type in Username: **application**
- Type in Password: **819grand**
- Click **Log in (button below)**
- Once Logged in you will be directed to the page that holds the **2014 Funding Application**. If you return to the United Way of Long Island website to view the application again, go to [www.unitedwayli.org/application](http://www.unitedwayli.org/application) as you are already logged on.
- Click on the Blue Button
- **You must complete and save the document directly to your computer in your preferred folder.**
- Once you have completed your download, please return to United Way's website and click Log Out from the HOME menu in the upper left corner of the United Way of Long Island home page.

Should you have difficulty downloading the application, please contact Jonathan Tafarella [jtafarella@unitedwayli.org](mailto:jtafarella@unitedwayli.org) or 631-940-3738. Should you have questions about completing the application, please contact Trish Rivers at [TRivers@unitedwayli.org](mailto:TRivers@unitedwayli.org) or 631-940-3719.

# GIVE. ADVOCATE. VOLUNTEER. LIVE UNITED



## Agencies Submitting by December 2<sup>nd</sup>

\*Adelante of Suffolk County  
Adults & Children w/ Learning & Developmental Disabilities  
\*AHRC Nassau  
AHRC Suffolk  
Baldwin Community House  
\*Bellport Boys & Girls Club  
\*Bellport, Hagerman, East Patchogue Alliance  
Catholic Charities  
\*Central Nassau Guidance & Counseling Services  
Child Care Council of Nassau  
\*Child Care Council of Suffolk  
Colonial Youth and Family Services  
Community Development Corporation of Long Island  
\*Concern for Independent Living  
COPAY  
Developmental Disabilities Institute  
Dominican Sisters Family Health Service  
The Early Years Institute  
\*East Hampton Day Care Center  
Economic Opportunity Commission of Nassau County  
Economic Opportunity Council of Suffolk  
\*EAC Network  
EPIC Long Island  
Family & Children's Association  
Family Service League of Suffolk  
Federation of Organizations/Foster Grandparent Program  
\*Freeport Pride  
La Fuerza Unida  
Girl Scouts, Suffolk Council  
Gurwin Jewish Nursing & Rehabilitation Center  
Harbor Day Care Center  
Haven House/Bridges (HHB)  
Health & Welfare Council of LI  
\*Hicksville Boys & Girls Club(Hicksville Teenage Council Inc.)  
\*Hi-Hello Child Care Center  
Island Harvest Food Bank  
The Life Enrichment Center of Oyster Bay  
The Life's WORC

Littig House Community Center  
Long Beach Reach  
Long Island Alzheimer's Foundation  
Long Island Association for AIDS Care (LIAAC)  
Long Island Cares, The Harry Chapin Food Bank  
LI Child & Family Development Services (LI Head Start)  
LI Coalition for the Homeless  
\*Long Island Crisis Center  
L I Hearing & Speech Society  
Long Island Housing Services  
\*Mental Health Assn of Nassau County  
Nassau-Suffolk Law Services Committee  
National Multiple Sclerosis Society, Long Island Chapter  
North Shore Child Family & Guidance Center  
\*Options for Community Living  
Peconic Community Council  
\*Pederson-Krag Center  
Peninsula Counseling Center  
Port Counseling Center (Division of Long Beach Reach, Inc.)  
\*Pronto of Long Island  
The Rehabilitation Institute  
\*The Retreat  
The Safe Center Long Island  
SJK Listening Therapy Program  
Skills Unlimited  
South Shore Child Guidance Center  
Southeast Nassau Guidance Center  
Suffolk County Coalition Against Domestic Violence  
Transitional Services of New York for Long Island, Inc. (TSLI)  
United Cerebral Palsy Association of Greater Suffolk, Inc.  
United Cerebral Palsy Association of Nassau County  
Victims Information Bureau of Suffolk (VIBS)  
Visiting Nurse Association of Long Island  
Visiting Nurse Service & Hospice of Suffolk  
\*Wyandanch Homes & Property Development Corp.  
YES Community Counseling Center  
YMCA of Long Island  
\*Youth & Family Counseling Agency, Oyster Bay/East Norwich

**\* Agency to be scheduled for a site visit**



This completed application was considered and: \_\_\_\_\_ approved \_\_\_\_\_ will be approved  
by the Board of Directors at the \_\_\_\_\_ meeting.  
date / year

**If the application is not yet approved by the BOD, you must notify us in writing when application is approved.**

Name of Executive Director  
(Please Type or Print) \_\_\_\_\_

Signature of  
Executive Director \_\_\_\_\_

Name of President/Chair  
of Board of Directors  
(Please Type or Print) \_\_\_\_\_

Signature of  
President/Chair \_\_\_\_\_

Community Partner Name \_\_\_\_\_



## Program Narrative

Allocations levels are subject to availability of funds as well as a review of your organizational, programmatic and financial status. This application is for 2014 funding based on the program you identify in this application that falls under Health, Education or Income/Financial Stability. Refer to memo about aligning your United Way funded program with United Way's impact areas -- Health, Education and Income/Financial Stability. Or, using the program that was identified in your 2013 application give a brief report on the results for the program's past fiscal year and long-term expected outcomes/results. If awarded, funding can be used for any needs within the one program. Be sure to complete client information.

Instructions: Submit a report on the program for which United Way funding is being directed, **including outcomes/results**. If statistics are used, please note the source.

Program Name: \_\_\_\_\_  
(Attach one additional page, maximum, if needed.)

\*\*\*\*\*

# of persons served by this program in your organization's fiscal year just ended	_____ to _____	# _____
	(mo./yr.) (mo./yr.)	
# of persons served by this program in your organization's prior fiscal year	_____ to _____	# _____
	(mo./yr.) (mo./yr.)	

Do you keep a waiting list for this program? \_\_\_\_\_ How many persons? \_\_\_\_\_

## UNITED WAY OF LONG ISLAND

### **COMMUNITY PARTNER POLICIES**

#### 1. General Policy

United Way of Long Island, as the central fundraising and allocation instrument of the Nassau-Suffolk bi-county community, has the responsibility to consider the request of any voluntary agency for partnership and support.

The primary factors to be considered in determining membership are:

- Community need
- Ability of agency to provide quality service
- Availability of funding through United way
- Financial viability of agency

#### 2. Agency Non-Discrimination Policy

United Way of Long Island embraces diversity and equal opportunity as core values. UWLI defines diversity to include all human characteristics that make us unique as individuals. It includes everyone and excludes no one. Race, gender, geographic origin, culture, lifestyle, age, disability, sexual orientation, economic status, marital status and religion are just some of the characteristics that define us as people.

In its staffing and volunteer positions, United Way of Long Island requires its funded partner agencies to not discriminate against any person or persons based on race, color, gender, sexual orientation, gender identity, religion, age, disability, veteran status, national origin, pregnancy, ancestry, or any other category.

The agency must have, in compliance with the Equal Opportunity Act of 1972, a written non-discrimination policy as amended and regulations promulgated thereunder.

If your organization is an affiliate of a National organization, an unqualified signature is required by a National representative as well as the local representatives. **See Page 5.**

In addition:

- ✓ Agencies must be incorporated as non-profit organizations qualifying for charitable deduction under 501(C)(3) of the Internal Revenue Code.
- ✓ Agencies' programs must be consistent with the general aims and purposes of United Way of Long Island, which is to support health and human services on Long Island in the areas of Education, Health and Income/Financial Stability.
- ✓ Agencies must be incorporated in New York State.

#### 3. Requirements for Partnership

- ✓ Board of Directors

There must be an unpaid board of directors which has oversight of the agency. In some cases, Executive Directors are listed as Board members. This is the only exception for Board membership.

The membership of the board must be as broadly representative of the consumer and contributor interests of the community as possible.

The board shall conduct its business in accordance with by-laws which provide for periodic meetings, quorum requirements, and a specified method of nomination and election of directors and officers.

A rotation policy identifying limitation of continuous service of board membership is recommended.

#### ✓ Finances

The agency must maintain its accounting in accordance with Generally Accepted Accounting Principles.

It must have a federal tax exemption letter and agree to provide an annual audit, if legally required, by independent auditors of its financial operation upon request. The tax exemption letter must be dated after January 1990. You can obtain a recently dated copy by calling Kendall Hilson, Tax Exempt and Government Entities Division at 877-829-5500.

The agency must have a fidelity bond covering all employees and or board members who handle agency funds.

An agency's annual budget is the key instrument in United Way of Long Island – agency financial relationship. The agency's annual budget must reflect its program and regular financial statements must be provided as requested. The agency must agree to give United Way of Long Island full access to its financial records and procedures.

United Way's Community Impact Council, which is the primary decision-making body, and the Board of Directors, which is the final decision-making body, are comprised entirely of volunteers.

The Fund Distribution volunteers will conduct their annual review and such studies and conferences with the partner agency as are necessary.

#### ➤ Board

Management of the Agency must be vested in a responsible and active Board of Directors, comprised of unpaid volunteers which meets at least quarterly, and establishes and enforces policy. The Board should be large enough and so structured to be representative of the community it serves. It is recommended that the Agency have a specified plan for rotation or other arrangements which provide for new members. (Refer to item 3, Page 1)

#### ➤ Personnel

The Agency must demonstrate that it has an effective personnel management program which enables it to employ and retain a competent executive and staff. It is recommended that the Agency have a current written statement of personnel practices approved by its Board and available to the entire staff and a table of organization of staff approved by the Board.

United Way will provide technical assistance in developing the latter two items, when necessary.

➤ Continuity

The Agency must have been in operation as a 501(C)(3) organization for at least three years at the time of application for funding from United Way of Long Island. In the event the Agency does not meet the time requirement, but does offer a new and needed service or one for which there is a documented and urgent need, special consideration may be given or special temporary funding may be recommended which would in no way commit United Way of Long Island to fund the Agency on an annual basis.

➤ Quality of Services Rendered

It is expected that an applicant Agency should be capable of delivering its services competently and efficiently and at costs which are reasonable and generally in line with costs in present United Way agencies or non-United Way member agencies. To this end, it is expected that staff shall have adequate professional education and demonstrable experience in the needed service areas.

➤ Financial Condition

The Agency shall present documentation that it is in sound financial condition with reasonable financial obligations incurred through provision of its services.

➤ Facilities

Upon request for partnership, the Agency must have adequate housing properly located for the geographic area it serves and adequate physical facilities with which to operate its program.

Upon acceptance, partner agencies will be expected to comply with the following:

✓ Cooperation

The Agency must evidence its willingness to cooperate with other agencies in the planning and coordinating of community services to eliminate duplications and gaps and by adapting its own services toward a more balanced and effective community program. Agencies must be willing to identify with United Way of Long Island, conduct an annual employee campaign, use communications materials, i.e., printed materials.

✓ Auditing

Upon request of United Way, the Agency must have an annual audit, if legally required, conducted by an independent auditor(s) in accordance with Generally Accepted Accounting Standards.

4. Failure to Meet Criteria

At such time as the Community Impact Council in its collective judgment finds that the Partner Agency does not meet the preceding listed criteria, it shall promptly recommend to the Board of Directors of United Way of Long Island that the application be rejected.

7/10/03, Revised March 2013

## Agency Partnership Policy Signature Page

The Board of Directors, Administration, and staff of

\_\_\_\_\_ agree to comply with  
(agency name)

the Agency Partner Policies revised February 2013.

\_\_\_\_\_  
Chief Executive Officer Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Board President/Chairman Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
National Representative Signature (if applicable) and  
Title

\_\_\_\_\_  
Date

**SIGN AND RETURN WITH APPLICATION**