

Checklist for Allocation Proposals

- Allocation Proposals are Due by 5:00 p.m. WEDNESDAY, April 30, 2008**
 - 5 Copies**—please use paper clips only

 - Cover Page**
 - Approval date from your Board/Executive Committee
 - Signature of lead staff person
 - Type of funding

 - Form 2**—Section 1: Population Served Section 2: Fundraising Plan
 - Form 3**—Report on Accomplishments—*time period reported on should correspond to a previous workplan*
 - Form 4**—Workplan for coming (or current) year
 - Form 5**—Co-branding Efforts

 - Financials**
 - Copy of Current Budget and Actuals dated through 3/31/08
 - Balance Sheet to date
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Also include *ONE* copy of each of the following:

- Most recent Board Roster with addresses
- Board meeting place, dates and times
- Most recent IRS 990, standard form (those eligible to file 990 EZ must also provide *first two pages* of the standard form)
- Most recent audit, financial review, or compilation (refer to Funded Partner – Fiscal Reporting Policy)
- Signed copy of certification of Anti-Terrorism Compliance Measures
- Signed copy of Compliance Declaration –Oregon Employees Charitable Fund Drive
- Examples of materials, products or activities that demonstrate your agency's promotion of its partnership with United Way of Deschutes County