

UNITED WAY FINANCIAL REPORTING FORMS (BUDGET)

AGENCY: _____

ADDRESS: _____

MAILING ADDRESS: _____

CITY, STATE, ZIP: _____

TELEPHONE: _____

For the Fiscal Year

2008

President (CVO)

Executive Director

Mailing Address

Telephone

FINANCIAL HIGHLIGHTS	Last Year	This Year	(Projected) Next Year
Total Expenses			
Total Support & Revenue			
Excess			
Allocation + Designations From This United Way			
Allocation + Designations From Other United Ways			

What supplementary fund-raising activities does the agency conduct?

	<u>Activity</u>	<u>Net Results</u>	<u>Area Covered</u>	<u>Month Conducted</u>
1.				
2.				
3.				

FOR UNITED WAY USE ONLY

Audit report has been received by the United Way for the year ending _____

This audit report was: () Unqualified () Qualified

Qualified, explain: _____

AGENCY: _____ **DATE:** _____

SUMMARY INFORMATION

Program Data

What is the agency's mission? _____

What programs/services did your agency provide this year?

Target population served: (age, sex, special interest, etc.)

Number of unduplicated individual units served in United Way area:
(3 yrs. ago ____ , 2 yrs. ago ____ , last yr. ____).

2005 _____
2006 _____
2007 _____

Geographic area covered:

How are agency programs/services assessed for effectiveness?

What are the specific objectives?

PROGRAM FORM

AGENCY: _____
ADDRESS: _____
MAILING ADDRESS: _____
CITY, STATE, ZIP: _____

DIRECTOR: _____
PHONE: _____

1. New program to start next year. (if no new program, leave blank and go to #2.)

2. Continuing major programs. Please explain, including statistics & facts:

Substantiation of budget increase for program:

3. Programs, challenges, data or additional information you would like to share with the Budgets & Admissions Committee:
