

# LIVE UNITED



## UNITED WAY OF GREATER HIGH POINT 2025 ALLOCATION APPLICATION INSTRUCTIONS

### Accessing the Online Application

Application web address: <https://epledge.unitedwayhp.org/epledge.jsp>  
(please type this in your web browser **exactly** as it is)

- Enter username and password---neither is case sensitive.  
*If the wrong username/password is entered more than 5 times, you will be locked out. If this occurs, please contact: Latoya Bullock, (336) 899-0879, latoya.bullock@unitedwayhp.org*

### Important Menu Buttons:

**Save:** Allows user to save work (**program does not autosave**). *Does not submit.*

**Return:** Returns to previous page.

**Submit:** Submits work. ***Once submit is selected, the form will be locked, and changes cannot be made.***

**Status Column:** The status column will display "Outstanding" until the item has been submitted. When submit is selected, the status will change to "Completed". The item cannot be submitted if mandatory fields are left blank. Mandatory fields are marked with an "\*".

**Log Off:** Be sure to log off completely. To immediately sign back in, close the current browser and open another.

### Application Due Dates:

**Annual Funding:** **Thursday, February 13, 2025, by 4:00 pm**

**Multiyear Funding:** **Thursday, February 20, 2025, by 4:00 pm**

Online & hard copy applications and attachments must be submitted at this time.

## Main Menu

The main menu is divided into 4 sections:

1. Home Page
2. Agency Items
  - Patriot Act Form
  - Current Board Members
  - Agency Profile
3. Reporting
  - Instructions
  - **2025** Allocation Application
  - Comprehensive Report (click to view Agency Report Link & Program Report Link)
4. Log Off
5. Organizations- Use this to switch between organizations if you are connected to multiple agencies or sites.

**Home Page:** This will be the first page that will appear after login.

**Application Instructions:** Link is located under Reporting.

**Patriot Act Form:** Please complete this form and include it with your Agency Packet.

**Agency Profile:** This information should already be populated. If not, highlight the agency (not the program). Enter information regarding the agency. When finished, click on save. **Do not enter information about the program.**

**Current Board Members:** If you need to add new board members, highlight the agency. Click on Add. Enter the contact information for a board member. Enter the current date for the effective date. Click on Add. Repeat until all board members have been entered. Delete any incorrect information.

### **2025 Allocation Application:**

*\*\*Please be sure that you are only completing the items with the 2025 due date\*\**

*In each section, you may have a “copy from existing form” option. For existing programs, choose the most recent document and make changes as needed. When you complete each section, click on Save. **If you select Submit, the document will be locked, and you cannot make any changes. Only select submit when no additional changes will be made.***

### **Agency Information Items:**

**Agency Summary:** Complete the information regarding the agency. Click on Save.

**Board Composition Chart:** Complete the composition chart. The “Total” field will **not** automatically calculate. Click on Save.

**Proposed Agency Budget:** Enter the agency budget for the **July 1, 2025-June 30, 2026** fiscal year. Click on Save. The “copy from existing budget” option allows you to copy a budget from a previous

year. If using this option, choose **2024**/Agency Detail/Agency Total/Proposed and click Copy. Make changes as needed.

**Every Dollar Matters:** This information can reference any UWGHP funded program in your agency. **If possible please try to reference each of your funded programs at least once.**

**Education/Health/Income Items:**

Select the package that corresponds to the funding panel and funding type that the program reports to. For example, if the program reports to the Income Panel and is currently in multiyear funding, select "Income-Multiyear".

*~Note: If the program is in multiyear funding, be sure to complete the correct application.*

**Application Cover Page:** Complete the information regarding the agency and program. Click on Save.

**Program Narrative:** Complete the information regarding the program. Click on Save.

**Other Agency & Program Info:** Complete the information regarding the program. Click on Save.

**Finances:** Complete the information regarding finances. Click on Save.

**Proposed Program Demographics:** Complete each demographic category for the program year **July 1, 2025-June 30, 2026**. Click on Save. *All categories should have the same total.*

**Demographic Notes-Proposed:** Use this section to provide any explanations of proposed demographic numbers. This section is not mandatory.

**Actual Program Demographics:** Complete each demographic category for the program year **July 1, 2023-June 30, 2024**. Click on Save. *All categories should have the same total.*

**Demographic Notes-Actual:** Use this section to provide any explanations of actual demographic numbers. This section is not mandatory.

**Program Outcomes:** Identify at least one S.M.A.R.T. goal (see page 4) and complete the information regarding that S.M.A.R.T. goal. You may add up to 3 S.M.A.R.T. goals. Be sure to complete Question #4. Click on Save.

**2024-2025 Program Budget:**

- Click on "Copy from existing budget"
- Select **2024/ UW Program Detail/Program/Proposed** (*this will not be an option for new programs*).
- The numbers from the current budget will populate.
- Make necessary changes and complete the budget for the current funding year: **July 1, 2024-June 30, 2025**
- **Line 13 should equal the 2024-2025 program funding amount.**
- **Use the comment box to explain "Other" revenue and expense items.**
- Click on Save.

### **2025-2026 Program Budget:**

- Click on "Copy from existing budget"
- Select **2024/** UW Program Detail/Program/Current (*this will not be an option if you have not completed the budget above*)
- The numbers from the current budget will populate.
- Make necessary changes and complete the budget for the upcoming funding year: **July 1, 2025-June 30, 2026.**
- **Line 13** should equal the **2025-2026** program funding request.
- **Use the comment box to explain "Other" revenue and expense items.**
- Click on Save.

**Identification of Other Funds:** List other funding sources that support this program. Click on Save.

**Program Success Stories:** Provide at least one recent (**2024 or 2025**) success story from the program you are requesting funding for. You may provide more than one.

### **Comprehensive Report:**

Click, open and print your **2025** Agency Report and the **2025** Program Report. You should be able to print even if your application is still outstanding. **Print the PDF version. Do not use print screen.**

### **Log Off:**

Ends your session.

### **S.M.A.R.T. Goals**

**S**pecific, **M**easurable, **A**ttainable, **R**ealistic & **T**imely

*Specific:* Specific goals answer who, what, where, when, and why and/or how

*Measurable:* A measurable goal addresses quantity and time

*Attainable:* Goals should not be out of reach

*Realistic:* Your agency must be willing and capable to reach the goal

*Timely:* The goal should include a completion date

## **Printing and Submission: Yearly Applications**

- Provide **1** copy of the Agency Packet on **three hole punched** paper (see below).
- Print **2** copies of the Agency Report (located under Comprehensive Report) on **three hole punched** paper (1 for the Agency Packet, and 1 extra).
- Make **15** copies of the signed Program Report (located under Comprehensive Report) on **three hole punched** paper. After copies have been made, separate page 1 of the original Program Report (Application Cover Page) that has the original signatures. Include this page with the Agency Packet and replace it in the appropriate copy of the Program Report.
- Paper clip each copy of the Agency & Program Reports- **Do not staple.**
- Separate each copy of the Program Report with a tab displaying the program name (**UW will supply the tabs**)
- All documents must be printed **double sided.**
- **Do not submit any additional information.** For example, do not submit pictures, news clippings, client letters, etc.

### **Agency Packet**

All items must be assembled in the following manner and **placed in a folder:**

- Application Cover Page(s) from each program with original signatures
- 2025 Agency Report
  - Agency Summary (found in agency information)
  - Board Composition Chart (found in agency information)
  - Proposed Agency Budget (found in agency information)
  - Every Dollar Matters (found in agency information)
- Attachments
  - ✓ IRS 501(c)(3) letter
  - ✓ Solicitation License
  - ✓ Signed Patriot Act/Counterterrorism Compliance Form
  - ✓ Agency Financial Statement as of December 31, 2023
    - Please include Balance Sheets & Profit & Loss Statements
    - For national organizations, please include your local chapter's financial information
  - ✓ Most Recent Financial Audit
  - ✓ 990
  - ✓ Annual Report

**Items should be in a folder** with the organization's name and funding year (2025) **clearly** written on it. For items too large to fit in the folder, place behind the folder and bind with a rubber band.

### **Printing and Submission: Multi-Year Applications**

- Follow the directions for submitting the Agency Packet.
- Print only **1** copy of the Agency & Program reports on **three-hole punched** paper.

### **Printing and Submission: New Program Applications**

- Follow the directions for submitting the Agency Packet.
- Print only **1** copy of the Agency report & **10** Program reports on **three-hole punched** paper. Use tabs & paperclips to separate each program report.