

**UNITED WAY OF NORTHWEST FLORIDA  
COMMUNITY IMPACT FUND  
2018 GRANT APPLICATION  
PART 3: AGENCY FINANCIAL OVERVIEW**

**Agency Name:** \_\_\_\_\_

**Contact Name:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**FINANCIAL OVERVIEW** (From IRS Form 990)

- NOTE: Much of this information was already submitted with your Affiliated Agency Application! However, your Affiliated Agency Application is not shared with the Funds Distribution Committees. In order to save time, we recommend using the information submitted in Attachment 5 of the Affiliated Agency Application for this portion of the grant application. The *Agency Financial Overview* (Part 3) of this grant application is agency wide information, while Parts 1 and 2 of this grant application are program specific.

**A. ATTACH A COPY OF YOUR MOST RECENT ANNUAL BOARD-APPROVED BUDGET, BALANCE SHEET, AND PROFIT AND LOSS STATEMENT.**

**B. TOTAL REVENUE:** \$ \_\_\_\_\_  
(Form 990; Part VIII; Line 12; Column A)

Statement of Revenue:

\$ \_\_\_\_\_ Fundraising Events (Form 990; Part VIII; Line 1C)  
\$ \_\_\_\_\_ Government Grants & Contributions (Form 990; Part VIII; Line 1E)  
\$ \_\_\_\_\_ Other Contributions, Gifts & Grants (Form 990; Part VIII; Line 1F)  
\$ \_\_\_\_\_ Program Service Revenue (Form 990; Part VIII; Line 2G; Column A)  
\$ \_\_\_\_\_ Other Revenue (Form 990; Part VIII; Lines 3-10C; Column A)  
\$ \_\_\_\_\_ UWNWFL Grants

Percent of Revenue from Government Grants: \_\_\_\_\_ %  
(Government Grants & Contributions divided by Total Revenue)

Percent of Revenue from UWNWFL Grants: \_\_\_\_\_ %  
(UWNWFL Grants divided by Total Revenue)

C. TOTAL EXPENSES: \$ \_\_\_\_\_  
(Form 990; Part IX; Line 25; Column A)

Statement of Functional Expenses:

\$ \_\_\_\_\_ Program Service Expenses (Form 990; Part IX; Line 25; Column B)

\$ \_\_\_\_\_ Management & General Expenses (Form 990; Part IX; Line 25; Column C)

\$ \_\_\_\_\_ Fundraising Expenses (Form 990; Part IX; Line 25; Column D)

Percent of Program Service Expenses: \_\_\_\_\_ %  
(Program Service Expenses divided by Total Expenses)

Percent of Management & General Expenses: \_\_\_\_\_ %  
(Management & General Expenses divided by Total Expenses)

Percent of Fundraising Expenses: \_\_\_\_\_ %  
(Fundraising Expenses divided by Total Expenses)

TOTAL AFR (Admin/Fundraising) Expenses: \_\_\_\_\_ %  
(Management & General Expenses added to Fundraising expenses divided by Total Revenue-  
use the dollar amounts listed above in sections B and C for this calculation, not the percentages)

D. CURRENT AGENCY OPERATING DEFICIT OR SURPLUS: \$ \_\_\_\_\_

E. CURRENT BOARD DIRECTED RESERVE FUND BALANCE: \$ \_\_\_\_\_  
(Attach authorized uses)

F. CURRENT DONOR RESTRICTED FUND BALANCE: \$ \_\_\_\_\_  
(Attach any restrictions)

G. Percentage of UWNWFL funding impacting low or moderate income consumers: \_\_\_\_\_ %

H. **OPTIONAL:** Any additional finance-related information you would like to share with United  
Way of Northwest Florida: \_\_\_\_\_  
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