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TRA DOCKET ROOM



United Way
of West Tennessee

January 27 2006

Ms Darlene Standley
Chief Utilities Division
Tennessee Regulatory Authority
460 James Robertson Parkway
Nashville, Tennessee 37243 0505

Dear Ms Standley

05 00317

Thank you for contacting us about our 2 1 1 petition In response to your letter dated January 18 2006 I have the following information for you

- 1 We have enclosed a copy of our December 31 2004 audited financial statements for your review
- 2 It is our understanding that, as of January 1, 2006, our application and payment to AIRS also grants us membership in TNAIRS A copy of our most recent application is enclosed
- 3 Primarily we receive calls for assistance with basic needs and for financial assistance Although, we do not maintain a precise database of each call at this point it is estimated that 80% of our calls fall in this category Of these, most requests are for help with utility bills, rent medical costs food, etc The remaining 20% include requests for information about programs that help in abuse situations, provide housing offer legal counseling (regarding TennCare), disabilities assistance etc Calls also are received for those wanting to volunteer their time for a specific program We anticipate that the volume and types of calls will change dramatically once a 2 1 1 system is developed and marketed locally
- 4 Presently all of our five full and one part time staff answer calls that require us to respond with information or a referral Volunteers currently are not used to perform this function It is anticipated that a 2 1 1 program would allow our United Way to employ a part time to full time person to take on the main role of developing the program, answering calls and both recruiting and supervise a core group of trained volunteers to meet the expected growth in caller volume Existing staff will continue to augment the service with their continued level of response
- 5 Once established it is anticipated that calls to our 2 1 1 system would be answered locally from our office during business hours of 8 00 a m to 4 30 p m , Monday through Friday In order to provide 24/7 availability we expect to immediately pursue a contractual relationship with another 2 1 1 provider in Tennessee to meet caller needs at night and during weekends

We hope this information is sufficient to help you further review our petition If you need anything more please feel free to contact me Thank you

Sincerely

Barry Matthews
President/CEO

*Changing lives Getting results That's what matters in Carroll, Crockett, Dyer,
Gibson, Hardeman, Haywood, Henderson, Madison, McNairy & Weakley counties*

UNITED WAY OF WEST TENNESSEE, INC

FINANCIAL STATEMENTS

DECEMBER 31, 2004

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ARNOLD, SPAIN, TRUETT & HEWITT, P L L C

CERTIFIED PUBLIC ACCOUNTANTS
227 OIL WELL ROAD
JACKSON TENNESSEE 38305

MEMBERS

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Independent Auditors' Report

Board of Directors
United Way of West Tennessee, Inc

We have audited the accompanying statement of financial position of the United Way of West Tennessee, Inc (United Way) (a nonprofit organization) as of December 31, 2004 and the related statements of activities, functional expenses, and cash flows for the year then ended. These financial statements are the responsibility of United Way's management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes consideration of internal control over financial reporting as a basis for designing audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the United Way's internal control over financial reporting. Accordingly, we express no such opinion. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; assessing the accounting principles used and significant estimates made by management; as well as evaluating the overall financial statement presentation. We believe that our audit provides a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the United Way as of December 31, 2004 and the changes in its net assets and its cash flows for the year then ended in conformity with accounting principles generally accepted in the United States of America.

Our audit was performed for the purpose of forming an opinion on the basic financial statements of the United Way taken as a whole. The accompanying supplemental schedule is presented for purposes of additional analysis, and is not a required part of the basic financial statements. Such information has been subjected to the auditing procedures applied in the audit of the basic financial statements and, in our opinion, is fairly stated, in all material respects, in relation to the basic financial statements taken as a whole.


Certified Public Accountants

Jackson, Tennessee
May 23, 2005

UNITED WAY OF WEST TENNESSEE, INC
STATEMENT OF FINANCIAL POSITION
DECEMBER 31, 2004

ASSETS**Current assets**

Cash and cash equivalents	\$ 734,796
Gift cards on hand	80
Miscellaneous receivable	1,963
Investment in stock	5,618
Pledges receivable, less allowance for uncollectibles of \$154,995	2 367,902
Prepaid expenses	<u>4,045</u>
Total current assets	<u>3,114,404</u>

Endowment investments

Cash and cash equivalents	144,714
Investments	<u>1,022,837</u>
Total endowment investments	<u>1 167,551</u>

Fixed assets

Furniture and equipment	75 096
Less Accumulated depreciation	<u>(70 766)</u>
Total fixed assets	<u>4 330</u>

Total assets

\$ 4,286 285

LIABILITIES AND NET ASSETS**Liabilities**

Accounts payable and accrued expenses	\$ 23 641
Accounts payable - agencies	1,086,551
Designations payable agencies	<u>753,746</u>
Total liabilities	<u>1,863 938</u>

Net Assets

Unrestricted	1,509,432
Temporarily restricted	33 760
Permanently restricted	<u>879 155</u>

Total net assets

2 422,347

Total liabilities and net assets

\$ 4 286 285

The accompanying notes are an integral part of the financial statements

UNITED WAY OF WEST TENNESSEE, INC
STATEMENT OF ACTIVITIES
YEAR ENDED DECEMBER 31, 2004

	<u>Unrestricted</u>	<u>Temporarily Restricted</u>	<u>Permanently Restricted</u>	<u>Total</u>
Public support, revenues, and reclassifications				
Contributions	\$ 1 638,304	\$ 52,633	\$ -	\$ 1 690 937
Realized return on investments	8,894	34,556	-	43,450
Unrealized gain (loss) on investments	(5 172)	-	-	(5,172)
Net assets released from restrictions				
Satisfaction of program requirements	<u>247,197</u>	<u>(247,197)</u>	<u>-</u>	<u>-</u>
Total public support, revenues, and reclassifications	<u>1 889,223</u>	<u>(160,008)</u>	<u>-</u>	<u>1,729,215</u>
Expenses and losses				
Program services	1,724,299	-	-	1,724,299
Management and general	218,354	-	-	218,354
Fund raising	<u>175,910</u>	<u>-</u>	<u>-</u>	<u>175,910</u>
Total expenses and losses	<u>2,118,563</u>	<u>-</u>	<u>-</u>	<u>2 118,563</u>
Change in net assets	(229,340)	(160,008)	-	(389 348)
Net assets at beginning of year	<u>1,738,772</u>	<u>193,768</u>	<u>879 155</u>	<u>2,811,695</u>
Net assets at end of year	<u>\$ 1 509,432</u>	<u>\$ 33,760</u>	<u>\$ 879,155</u>	<u>\$ 2 422 347</u>

The accompanying notes are an integral part of the financial statements

UNITED WAY OF WEST TENNESSEE, INC
STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED DECEMBER 31, 2004

	Program Services	Support Services		Total
		General & Administrative	Fund Raising	
Disbursements to agencies	\$ 1,519,945	\$ -	\$ -	\$ 1,519,945
Disaster relief disbursements	160,388	-	-	160,388
Salaries - executive director	15,810	15,810	31,618	63,238
Salaries - other	14,972	98,429	62,743	176,144
Employee benefits	5,164	40,778	31,939	77,881
Occupancy	749	5,919	4,636	11,304
Office supplies and expense	280	2,212	1,733	4,225
Computer maintenance	223	1,759	1,378	3,360
Copier lease	180	1,421	1,113	2,714
Repairs and maintenance-equipment	99	784	614	1,497
Postage	321	2,534	1,985	4,840
Insurance	239	1,884	1,476	3,599
Telephone	313	2,474	1,938	4,725
Miscellaneous	322	2,545	1,993	4,860
Travel	744	5,879	4,605	11,228
Campaign operations and supplies	1,489	11,762	9,212	22,463
Marketing	128	1,010	791	1,929
Dues - Association	288	2,273	1,781	4,342
Dues - United Way organizations	1,475	11,646	9,122	22,243
Training	33	259	203	495
Legal and professional fees	670	5,288	4,142	10,100
Investment expenses	289	2,283	1,788	4,360
Depreciation	178	1,405	1,100	2,683
Total expenses	<u>\$ 1,724,299</u>	<u>\$ 218,354</u>	<u>\$ 175,910</u>	<u>\$ 2,118,563</u>

The accompanying notes are an integral part of the financial statements

UNITED WAY OF WEST TENNESSEE, INC
STATEMENT OF CASH FLOWS
YEAR ENDED DECEMBER 31, 2004

Cash flows from operating activities

Change in net assets	\$ (389,348)
Adjustments to reconcile change in net assets to net cash used by operating activities	
Depreciation	2,683
Contributions of stock	(14,319)
Unrealized (gain) loss on investments	5,172
(Gain) loss on sale of investments	(98)
(Increase) decrease in gift cards on hand	4,420
(Increase) decrease in miscellaneous receivables	(1,804)
(Increase) decrease in pledges receivable	294,466
(Increase) decrease in prepaid expense	1,272
Increase (decrease) in accounts payable	(100,938)
Increase (decrease) in designations payable	(7,551)
Net cash provided (used) by operating activities	<u>(206,045)</u>

Cash flows from investing activities

Acquisition of property and equipment	(1,529)
Purchase of investments securities	(864,291)
Proceeds from redemption of investments	<u>985,073</u>
Net cash provided (used) by investing activities	<u>119,253</u>

Net increase (decrease) in cash (86,792)

Cash at beginning of period 966,302

Cash at end of period \$ 879,510

The accompanying notes are an integral part of the financial statements

UNITED WAY OF WEST TENNESSEE, INC
NOTES TO FINANCIAL STATEMENTS
DECEMBER 31, 2004

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

A Nature of Activities

The United Way of West Tennessee, Inc (United Way) strives to promote cooperation between the citizens of West Tennessee excluding Shelby and Obion Counties, and the various non-profit agencies serving the citizens. This is accomplished, by providing leadership and guidance during a united campaign to solicit funds that can be disbursed to the various agencies in accordance with the directions and intention of the donors.

B Basis of Presentation

The accompanying financial statements have been prepared on the accrual basis of accounting in accordance with generally accepted accounting principles. Net assets and revenues, expenses, gains, and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, net assets of United Way and changes therein are classified and reported as follows:

Unrestricted Net Assets - Net assets that are not subject to donor imposed stipulations.

Temporarily Restricted Net Assets - Net assets subject to donor-imposed stipulations that may or will be met, either by actions of United Way and/or the passage of time. When a restriction expires, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities as net assets released from restrictions.

Permanently Restricted Net Assets - Net assets subject to donor-imposed stipulations, that they be maintained permanently by United Way. Generally, the donors of these assets permit the organization to use all or part of the income earned on any related investments for general or specific purposes.

C Contributions

Contributions, including unconditional promises to give, are recorded as made. All contributions are available for unrestricted use unless specifically restricted by the donor. Conditional promises to give are recognized when the conditions on which they depend are substantially met. Unconditional promises to give due in the next year are recorded at their net realizable value.

D Land, Buildings and Equipment

Land, buildings and equipment are recorded at cost or at estimated fair value at the date of gift. Donations are reported as unrestricted support unless the donor has restricted the donated asset to a specific purpose. United Way follows the practice of capitalizing all expenditures for equipment in excess of \$1,000. Depreciation is provided using the straight-line method over the five year estimated useful lives of the assets.

E Functional Allocation of Expenses

The costs of providing the United Way's various programs and supporting services have been summarized on a functional basis in the statement of activities. Accordingly, certain costs have been allocated among the programs and supporting services benefited.

UNITED WAY OF WEST TENNESSEE, INC
NOTES TO FINANCIAL STATEMENTS (Cont)
DECEMBER 31, 2004

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (Cont)

F Income Tax Status

The United Way qualifies as a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code and, therefore, has no provision for federal income taxes

G Cash and Cash Equivalents

For purposes of the statement of cash flows, United Way considers all cash and other highly liquid investments with initial maturities of three months or less to be cash equivalents

H Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

NOTE 2 - CASH AND CASH EQUIVALENTS

United Way has entered into a repurchase agreement whereby the bank sells certain securities to them subject to the bank's agreement to repurchase identical securities from them at a specific future date or upon demand by either party at a stated price plus interest.

The following is a summary of cash and cash equivalents at December 31, 2004:

Unrestricted	
Cash on hand	\$ 100
Demand deposits	232,638
Repurchase agreements	<u>502,058</u>
Total unrestricted cash and cash equivalents	<u>\$ 734,796</u>
Restricted	
Cash	\$ 1,725
Government obligations (I)	136,915
Government obligations (P)	<u>6,074</u>
Total restricted cash and cash equivalents	<u>\$ 144,714</u>

NOTE 3 - GIFT CARDS ON HAND

Sears donated \$10,000 in gift cards to the United Way after the tornado's in May 2003 for the United Way to hand out to people in need. The United Way chose to use Disaster Recovery Services to handle deciding who qualified for the gift cards based on need. Disaster Recovery Services would then send a request to the United Way asking them to release a certain amount of gift cards to an individual. The remaining gift cards that have not been given out as of December 31, 2004 make up the \$80 in gift cards on hand on the balance sheet. Revenue and expenses related to this activity are included in the disaster relief contributions and disbursements.

UNITED WAY OF WEST TENNESSEE, INC
NOTES TO FINANCIAL STATEMENTS (Cont)
DECEMBER 31, 2004

NOTE 4 - PLEDGES RECEIVABLE

Pledges are made in the fall of each year during the annual campaign. These pledges are paid in the next year or by April 30, of the following year. Uncollected pledges not received by April 30 of the following year are written off at that time. This amounted to \$158,364 (2004) and \$197,820 (2003) of pledges deemed to be uncollectible.

The following is a summary of the pledges receivable at December 31, 2004:

	Percentage Uncollectible	Pledges Receivable
2003/04 Campaign	5.83%	\$ 289,126
2004/05 Campaign	(1) 6.28%	<u>2,233,771</u>
		\$ 2,522,897
Less - allowance for uncollectibles		<u>154,995</u>
Net pledges receivable		<u>\$ 2,367,902</u>

(1) The percentage uncollectible for the 2004/05 campaign has been estimated based on prior years' experience.

NOTE 5 - FURNITURE AND EQUIPMENT

Depreciation of furniture and equipment is calculated on the straight line basis over the estimated useful lives of the assets.

Furniture and equipment	\$ 75,096
Less - Accumulated depreciation	<u>70,766</u>
	<u>\$ 4,330</u>

Depreciation expense for the year ended December 31, 2004 was \$2,683.

NOTE 6 - LONG-TERM INVESTMENTS

The following is a summary of securities held to maturity as of December 31, 2004.

Investments are stated at fair value.

	Cost	Estimated Fair Value	Unrealized Gain (Loss)
Mutual Funds - fixed income			
Federated U.S. Government 2-5 year securities	\$ 30,000	\$ 31,494	\$ 1,494
Mutual Funds - equities			
Dodge & Cox Stock Fund	21,233	23,345	2,112
Fidelity Low Price Stock Fund #316	5,436	8,577	3,141
Longleaf Partners Fund	8,197	11,248	3,051
Montag & Caldwell Growth Fund	34,578	28,199	(6,379)
T Rowe Price Mid Cap Growth Fund	7,809	12,378	4,569
Vanguard International Growth Portfolio	13,087	12,443	(644)
Vanguard Explorer FD 24	5,242	8,372	3,130
Vanguard Index S & P 500	11,714	11,649	(65)
U.S. Treasury Notes	<u>885,620</u>	<u>875,132</u>	<u>(10,488)</u>
	<u>\$ 1,022,916</u>	<u>\$ 1,022,837</u>	<u>\$ (79)</u>

UNITED WAY OF WEST TENNESSEE, INC
NOTES TO FINANCIAL STATEMENTS (Cont)
DECEMBER 31, 2004

NOTE 6 - LONG-TERM INVESTMENTS (Cont)

The following schedule summarizes investment return and its classification in the statement of activities

	Unrestricted	Temporarily Restricted	Total
Interest and dividend income	\$ 8,796	\$ 34,556	\$ 43,352
Net realized gains (losses)	98		98
Total realized return on investments	8,894	34,556	43,450
Net unrealized gains (losses)	(5,172)	-	(5,172)
Total investment return	<u>\$ 3,722</u>	<u>\$ 34,556</u>	<u>\$ 38,278</u>

NOTE 7 - ENDOWMENT FUNDS

The endowment funds consist of several contributions, with different types of restrictions. The Robertson Brothers principal is restricted in perpetuity to benefit the underprivileged children of the City of Jackson, Tennessee (the City) and to support the program of the United Way. The interest earned on the principal is restricted, but is available to be used to benefit the underprivileged children of the City. Other endowments include an unrestricted trust, which originated in the early days of United Way and a \$1,000 endowment by David Hallock. The interest earned on the trust is restricted for United Way administrative expense. The principal of the Hallock endowment is restricted in perpetuity and the interest is restricted to purchase a plaque each year honoring a volunteer. In addition, a new trust was received from the French family near the end of 1999. There are no restrictions on this trust.

The endowment funds on hand at December 31, 2004 consist of the following:

Permanently restricted funds	
Robertson Brothers	\$ 878,155
Hallock	<u>1,000</u>
Total permanently restricted funds	<u>879,155</u>
Unrestricted endowments	
French trust	71,269
Other endowments and earnings	<u>217,127</u>
Total unrestricted endowments	<u>288,396</u>
Total endowment funds	<u>\$ 1,167,551</u>

UNITED WAY OF WEST TENNESSEE, INC
NOTES TO FINANCIAL STATEMENTS (Cont)
DECEMBER 31, 2004

NOTE 8 - OPERATING LEASE

In March 2002 the United Way entered into a 60 month lease agreement with Xerox for the rental of a copier. In November 2003 the United Way entered into a 60 month lease agreement with St. John's Masonic Lodge #332 for the rental of office space. The future minimum lease payments are as follows:

<u>Year Ending December 31</u>	
2005	7,800
2006	7,800
2007	7,800
2008	6,500
	<u>\$ 29,900</u>

NOTE 9 - FAIR VALUES OF FINANCIAL INSTRUMENTS

The estimated fair values of the United Way's financial instruments, none of which are held for trading purposes, are as follows:

	<u>Carrying Amount</u>	<u>Fair Value</u>
Financial assets		
Cash and cash equivalents	\$ 879,510	\$ 879,510
Pledges receivable	2,367,902	2,367,902
Investment in stock	5,006	5,618
Long-term investments	1,022,916	1,022,837

The following methods and assumptions were used by the United Way in estimating fair value disclosures for financial instruments:

Cash, cash equivalents, and pledges receivable: The carrying amounts reported in the statement of financial position approximate fair value because of the short maturities of those instruments.

Long-term investments: The fair values of investment securities are based on quoted market prices for those investments.

NOTE 10 - COMMITMENTS

The United Way receives pledges from individuals and corporations for a calendar year (January 1 thru December 31). However, the United Way makes commitments to fund its agencies on a fiscal year basis (July 1 thru June 30). Therefore, on July 1 of each year the United Way makes commitments for six months longer than the pledges it received to cover the commitments.

UNITED WAY OF WEST TENNESSEE, INC
SCHEDULE OF SUPPORT, REVENUE AND EXPENSES
AND CHANGES IN NET ASSETS BY COUNTY
YEAR ENDED DECEMBER 31 2004

Revenue, gains, and other support	Madison	Gibson	McNairy	Weakley	Henderson	Haywood	Carroll	Dyer	Total
Contributions	\$ 806 696	\$ 159 134	\$ 100 032	\$ 109 193	\$ 140 826	\$ 111 274	\$ 49 199	\$ 265 789	\$ 1 742 143
Less Uncollectible pledge	8 758	12 623	20 329	2 304	940	24 751	16 312	18 516	104 533
Net contributions	797 938	146 511	79 703	106 889	139 886	86 523	32 887	247 273	1 637 610
Dividend and interest income	8 796								8 796
Dividend and interest income Endowment Fund	34 556								34 556
Stock contributions	14 319								14 319
Administrative fees retained on amount designated by donors for specific organization	88	239	95	287	69	22	194	1 541	2 535
Other designated contribution	9 301	3 906	2 610	1 245	3 179	1 341	5 980	8 217	35 779
Unrealized gain (loss) on investment	(5 172)								(5 172)
Gain (loss) on sale of investment	98								98
Miscellaneous income	694								694
Total revenue gains and other support	860 618	150 636	82 408	108 421	143 134	87 886	39 061	257 031	1 729 215
Expenses and losses									
Program services									
Agencies	729 515	92 725	104 016	86 054	150 701	136 640	50 502	169 792	1 519 945
Other program expense	204 354								204 354
Support services									
Management and general expenses	218 354								218 354
Fund raising expenses	175 910								175 910
Administrative expense transfer	(232 219)	44 724	27 733	19 109	34 919	32 310	15 201	58 223	
Total expenses and losses	1 095 914	137 449	131 749	105 163	185 620	168 950	65 703	228 015	2,118 563
Change in net assets	(235 296)	13 207	(49 341)	3 258	(42 486)	(81 064)	(26 642)	29 016	(389 348)
Net assets at beginning of year	1 853 615	210 740	117 605	79 829	158 114	145 856	(11 465)	257 401	2 811 695
Net assets at end of year	\$ 1 618 319	\$ 223 947	\$ 68 264	\$ 83 087	\$ 115 628	\$ 64 792	\$ (38 107)	\$ 286 417	\$ 2 422 347
Composition of net assets									
Unrestricted									
General	\$ 120 078	\$ 195 936	\$ 55 391	\$ 73 141	\$ 96 037	\$ 39 641	\$ (76 437)	\$ 247 398	\$ 751 185
Designated									
Collection shortfall									
Emergency Fund	208 516	28 011	12 873	9 946	19 591	17 492	38 330	39 019	373 778
Administrative	89 235					7 659			7 659
Endowments	287 575								89 235
Restricted									287 575
Success by Six	25 808								25 808
Disaster Recovery Service	7 952								7 952
Endowments	879 155								879 155
	\$ 1 618 319	\$ 223 947	\$ 68 264	\$ 83 087	\$ 115 628	\$ 64 792	\$ (38 107)	\$ 286 417	\$ 2 422 347



Agency Application for Membership

*HARD COPY AND CHECK
IN MAIL*

Please fill out this application completely and mail or fax back with payment to
11240 Waples Mill Road Suite 200 Fairfax, Virginia 22030 or fax it to (703) 359-7562
Contact the AIRS office at (703) 218-AIRS (2477) if you have questions

BK
1/10/06

Organization Name United Way of West Tennessee

Executive Director or Primary Contact Barry Matthews, President/CEO
(This will be the primary contact for all of AIRS business, e g , membership renewal notices, annual report, etc)

Street Address 1341 North Highland Avenue

City Jackson State/Province Tennessee

ZIP/Postal Code 38301 Country USA

Mailing Address (If different from above) _____

City _____ State/Province _____ ZIP/Postal Code _____

Telephone 731-422-1816 E-mail address matthews@unitedway tn org
(Will be the email that all electronic communications
from AIRS will be sent to, e g newsletter)

Fax 731-422-1816 Web Site Address www unitedway tn org

Please choose your level of membership by checking the appropriate box below
For a worksheet to assist you in calculating the optimal membership level for your organization, please visit the AIRS website at **www airs org** and look for the latest news column on the homepage *Each year you will be able to re-evaluate your needs to decide which level is best for you*

☒ **BASIC MEMBERSHIP**

Membership Benefits

- Voting Privileges
- AIRS Newsletter
- Affiliate Membership Benefits

☐ **STANDARD MEMBERSHIP**

Membership Benefits

- Voting Privileges
- AIRS Newsletter
- Affiliate Membership Benefits
- AIRS Journal
- I&R Toolkit
- 5% Discount on Products

☐ **ENHANCED MEMBERSHIP**

Membership Benefits

- Voting Privileges
- AIRS Newsletter
- Affiliate Membership Benefits
- AIRS Journal
- I&R Toolkit
- ABCs of I&R
- 10% Discount on Products

☐ **PREMIUM MEMBERSHIP**

Membership Benefits

- Voting Privileges
- AIRS Newsletter
- Affiliate Membership Benefits
- AIRS Journal
- I&R Toolkit
- ABCs of I&R
- 15% Discount on Products

See next page for membership fees and payment options

Membership Categories & Fees

Month Joined	Basic Membership	Standard Membership for agencies < \$75,000	Standard Membership for agencies > \$75,000	Enhanced Membership	Premium Membership
January	\$50 00	\$250 00	\$350	\$500 00	\$750 00
February	\$50 00	\$250 00	\$350	\$500 00	\$750 00
March	\$50 00	\$250 00	\$350	\$500 00	\$750 00
April	\$50 00	\$250 00	\$350	\$500 00	\$750 00
May	\$50 00	\$250 00	\$350	\$500 00	\$750 00
June	\$50 00	\$250 00	\$350	\$500 00	\$750 00
July	\$37 50	\$187 50	\$262 50	\$375 00	\$562 50
August	\$37 50	\$187 50	\$262 50	\$375 00	\$562 50
September	\$37 50	\$187 50	\$262 50	\$375 00	\$562 50
*October	\$62 50	\$312 50	\$437 50	\$625 00	\$937 50
*November	\$62 50	\$312 50	\$437 50	\$625 00	\$937 50
*December	\$62 50	\$312 50	\$437 50	\$625 00	\$937 50

*Membership fee covers rest of current year and all of the following year

Payment Information

Amount Enclosed \$ 50 00 Payment ☒ Check enclosed (Payable to AIRS)

☐ Purchase Order # _____

For Credit Card Payment ☐ Visa ☐ MasterCard ☐ Amex

Account Number _____

Name (as it appears on card) _____

Expiration Date _____ Signature _____

Billing Address, If Different from Above (please include Street Address, City, State and Zip)

Type of Organization

<input type="checkbox"/>	United Way	<input type="checkbox"/>	Independent I&R	<input type="checkbox"/>	Crisis Center	<input type="checkbox"/>	State government
<input type="checkbox"/>	Area Agency on Aging	<input type="checkbox"/>	Military	<input type="checkbox"/>	Public Library	<input type="checkbox"/>	Federal government
<input type="checkbox"/>	Community Council	<input type="checkbox"/>	Volunteer Center	<input type="checkbox"/>	Local government	<input type="checkbox"/>	For-Profit
<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	Other _____

Service Delivery Information

Geographic Area Served (Chose one category that best describes the service area)

<input type="checkbox"/>	State/Province	<input type="checkbox"/>	Single County List County	_____
<input type="checkbox"/>	City/Town	<input checked="" type="checkbox"/>	Multi-County List of Counties	_____

Total Annual Inquiries/Contacts

2005 __1,000_____

Business Hours

<input checked="" type="checkbox"/>	Standard Business Hours Monday - Friday (8 00-8 30 AM to 5 00-5 30 PM)
<input type="checkbox"/>	Extended Evening Hours/No Weekends
<input type="checkbox"/>	Extended Evening Hours/Including Weekends
<input type="checkbox"/>	24 Hours /7 Days

Number of I&R Staff

<input type="checkbox"/>	Full-Time	<input type="checkbox"/>	Part-Time	<input type="checkbox"/>	Volunteers
<input type="checkbox"/>	1-10	<input checked="" type="checkbox"/>	1-10	<input type="checkbox"/>	1-10
<input type="checkbox"/>	11-25	<input type="checkbox"/>	11-25	<input type="checkbox"/>	11-25
<input type="checkbox"/>	25-50	<input type="checkbox"/>	25-50	<input type="checkbox"/>	25-50
<input type="checkbox"/>	51-75	<input type="checkbox"/>	51-75	<input type="checkbox"/>	51-75
<input type="checkbox"/>	over 75	<input type="checkbox"/>	over 75	<input type="checkbox"/>	over 75

Type of I&R Program (Mark the one that best describes the overall program)

<input checked="" type="checkbox"/>	Comprehensive	<input type="checkbox"/>	Aging	<input type="checkbox"/>	Child Care RR	<input type="checkbox"/>	311
<input type="checkbox"/>	Crisis	<input type="checkbox"/>	Disability	<input type="checkbox"/>	Library	<input type="checkbox"/>	Other_____
<input type="checkbox"/>	Comp/Crisis	<input type="checkbox"/>	Military	<input type="checkbox"/>	2-1-1 Center	<input type="checkbox"/>	_____

Scope of Operations (Mark all that apply)

	Addictions		Corporate Employees		Library
x	Adults with Disabilities		Crisis Hotline	x	Literacy
x	Ages 60+ and Their Care		Crisis Intervention	x	Mental Health
	Ages 65+ and Their Care		Disability I&R		Military Family Services
	AIDS/HIV		Energy Assistance	x	Pregnancy/Parenting
x	Basic Needs		Ethnic Concerns	x	Special Education
	Bisexual/Transgender	x	Financial Services		Support Groups
	Caregivers		Gay-Lesbian		Teen Line
	Casemanagement	x	General Community		Victims of Crime
	Child Care R&R		Government Services	x	Women
x	Children	x	Health	x	Young Adults
x	Children with Special Health Needs	x	Housing	x	Youth
			Jewish		

What classification system/taxonomy do you use?

	AIRS/INFO LINE Taxonomy of Human Services		Keyword
	UWASIS or Modified UWASIS		I&R Thesaurus of the Association of Community Information Centres of Ontario
x	In-House Developed Taxonomy		Other Taxonomy _____

Financial Information

Annual I&R Budget

x	Less than \$50,000		\$100 001 to 500,000		\$1,000,000 – 2,000,000
	\$50,001 to 100,000		\$500,001 to 1,000,000		Over \$2,000,000
					\$ _____

2-1-1 Information

Check the Description that best Fits Your 2-1-1 Planning

<input type="checkbox"/>	I&R is a 2-1-1 Center	<input type="checkbox"/>	Our community is not planning for 2-1-1
<input checked="" type="checkbox"/>	I&R will be the community's 2-1-1 Center	<input type="checkbox"/>	Don't know the status of 2-1-1 in our community
<input type="checkbox"/>	I&R is participating in 2-1-1 planning, will not be a center	<input type="checkbox"/>	

Return this form with payment to	AIRS 11240 Waples Mill Road Suite 200 Fairfax, Virginia 22030 or fax to (703) 359-7562
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Thank you for joining AIRS'

**Please look for your membership packet to arrive in the mail
approximately two weeks after your application is received at the AIRS
National office**