

## **Callaway County United Way Criteria and Procedures for Admission of Member Agencies**

### **A. Introduction**

The Callaway County United Way (CCUW) will consider application for membership by any non-profit community agency. The United Way Board will take into account the factors of community need, standards of performance of the agency, availability of the service through existing types of enterprises for federated fundraising, and available funds for adequate support of present and proposed programs.

**Mission:** The mission of the Callaway County United Way is to improve, consistently and measurably, the quality of life for all the people of Callaway County by raising and distributing funds, mobilizing community resources, and encouraging innovative solutions to the community's health and human service needs.

All programs and services provided by Callaway County United Way agencies must align with the mission of the CCUW.

### **B. General Standards and Requirements**

1. To participate, an agency must be formally recognized and qualified as a non-profit, incorporated organization under the law and obtain 501(c)3 status.
2. It must have a clear purpose and functions, which designates it as a voluntary, health, social welfare or character-building organization, which conducts programs and provides services in one or more of these fields. Its mission or purpose should be documented and approved by the governing body.
3. It must have a constitution and by-laws, which govern its operation.
4. The agency must have a Board of Directors or Trustees whose members serve without compensation and which meets regularly. This board should be large enough and structured so as to be representative of the community. It should have a specified plan for rotation or other arrangements, which provide new members.
5. The board must certify, in writing, its acceptance of the Federal Non-Discriminating Standards. The board must provide a written plan for affirmative action in assuring equal opportunity and equal consideration for participation in agency services, programs, and policy determination at the board and committee level.
6. If the agency operates under the auspices of an organized religious group, it must clearly separate its budget for support of social services from its religious programs.
7. The agency must agree to adopt and utilize the "Uniform Standards of Accounting and Financial Reporting for Voluntary Health and Welfare Organizations."

8. The agency should employ professional staff, as needed, who are qualified to carry out its programs. The staff should operate under a clear statement of personnel policies.
9. If accepted as a member, the agency must agree to abide by the United Way member agreement and fundraising policies.

**C. Management Controls**

1. The agency must give evidence of budgetary and program control and provision for periodic review and discussion by the board.
2. If the agency charges fees for its services, it must have a clearly defined fee policy, which relates to the cost of the service as well as the ability to pay.
3. The agency must have an annual audit performed by a qualified and independent auditor. (In the event of annual revenues of less than \$100,000, a CPA review may be substituted for the audit and a certified financial statement will be required. If the agency has a year where revenues reach or exceed \$100,000, the agency will then be required to have an annual audit performed.)
4. The agency must carry a blanket fidelity bond sufficient in amount and coverage to protect the public interest.

**D. Application for Inclusion**

1. Before formally applying for admission, an agency should obtain and review copies for the United Way member agency agreement and the United Way policies regarding member agencies.
2. After the agency board has reviewed these documents, the application form should be submitted to the Callaway County United Way Coordinator. This should be accompanied by a letter stating that the agency is aware of the admission and membership requirements and agrees to abide by them if admitted.

**E. The Admissions Process**

1. The United Way Executive Director will review the application for content and overall acceptability.
2. The application will be referred to the Callaway County Board of Directors for detailed review of both program and budget areas. This review will include a conference with representatives of the applicant agency.
3. The United Way Board of Directors will decide whether or not to fund the agency for the upcoming year and notify the agency of their decision.