

**UNITED WAY OF SOUTHWEST OKLAHOMA**

**CRITERIA FOR ADMISSIONS GUIDELINES**

**1. BE INCORPORATED, NOT-FOR-PROFIT AND I.R.S. TAX EXEMPT**

**Explanation:** Partner Non-Profit Organizations receiving United Way of Southwest Oklahoma (UWSWOK) dollars must be not-for-profit organizations that have been declared tax exempt by the Internal Revenue Service (IRS) and have a 501(c)(3) status. The UWSWOK has the responsibility to verify that the recipient organization has been ruled tax exempt by the IRS. Evidence of compliance with state charitable regulations should be provided, where applicable. A copy of the partner non-profit organization’s bylaws should also be provided to the UWSWOK.

**2. OFFERS HUMAN SERVICE PROGRAMS**

**Explanation:** The partner non-profit organization shall conduct a recognized program of social welfare activity in or for this community, and must show evidence to the satisfaction of the UWSWOK that it is effectively meeting a major need with no avoidable duplication of the work of other sound organizations.

As determined by UWSWOK board action the purpose of any new grants will be to address Health and Human service needs and fund emerging needs or stimulate innovative approaches to existing problems. Preference will be given to programs that

1. Support new and creative approaches to addressing longstanding and emerging community needs
2. Promote efficient partner non-profit organization and project administration
3. Leverage other resources to maximize the benefits of UWSWOK resources

**3. PROVIDES COMMUNITY SERVICE BASED ON DOCUMENTED NEED(S)**

**Explanation:** The partner non-profit organization’s program should address itself to an identifiable current need, demand, or problem in the community. Services which are supported by voluntary dollars should be clearly defined and their impact documented by the organization.

**4. NONDISCRIMINATORY**

**Explanation:** Discrimination by race, creed, color, sex, age, or religion should be prohibited in programs, services, staffing and volunteer areas. Provide a copy of your written affirmative action plan for employment of staff that reinforces compliance with the Equal Employment Opportunity Act of 1972.

**5. HAS AN ACTIVE, ROTATING VOLUNTEER LEADERSHIP THAT REPRESENTS THE DIVERSE ELEMENTS OF THE COMMUNITY**

**Explanation:** The partner non-profit organization’s board of directors or governing body should consist of volunteers who participate in the policy-making processes, represent the diverse elements of the community, and periodically rotate off the board and meet, at least, quarterly. Members of the volunteer structure should not receive financial remunerations from the program(s) or service(s) they oversee.

**6. HAS SOUND FINANCIAL AND PROGRAM MANAGEMENT**

**Explanation:** Demonstrated ability to manage the finances of the programs/services in accordance with generally accepted accounting procedures e.g. American Institute of Certified Public Accountants Guide (AICPA). The organization should provide a copy of its annual audit using an independent certified accountant or accounting firm, where feasible. A determination should be made as to the convincing likelihood that the organization can or will meet its stated program objectives.

**7. AGREES TO SUPPORT AND COOPERATE WITH THE UNITED WAY IN THE FOLLOWING AREAS. (1) Fundraising, (2) Planning, (3) Communications and (4) Allocations**

**Explanation:** UWSWOK’s relationships with Partner Non-Profit Organizations should be one of partnership rather than one of ownership. This relationship revolves around four primary areas: **Raising** voluntary contributions, **Planning** for the needs of the total community, **Communicating** their services to the public, and **Allocating** the funds through an equitable and effective citizen review process.

**8. AGREES TO PROVIDE TIMELY FINANCIAL AND PROGRAM INFORMATION**

**Explanation:** Partner Non-Profit Organizations share the responsibility of being accountable to the community for the expenditure of voluntary dollars. At least quarterly reporting of financial and periodical program data to the UWSWOK on operating costs and income, helps document partner non-profit organization expenditures and substantiates their validity.

**9. AGREES TO INFORM AND SEEK APPROVAL FROM THE UWSWOK FOR ALL SIGNIFICANT PROGRAM/STAFF EXPANSION OR REDUCTION**

**Explanation:** The UWSWOK should not be expected to assume financial responsibility for any expansion or discontinuation of the partner non-profit organization’s operations or facilities without prior approval and discussion of how this action will affect the partner non-profit organization’s allocations, if at all.

**10. AGREES TO OBTAIN PRIOR APPROVAL FROM THE UWSWOK BEFORE ENGAGING IN SUPPLEMENTAL FUNDRAISING EFFORT.**

**Explanation:** Partner Non-Profit Organizations must obtain prior approval from the United Way regarding their capital and supplemental fundraising needs. Efforts by Partner Non-Profit Organizations to develop sources of income should be carried out in such a manner as to assure that:

* The UWSWOK giving base in the community will not be adversely affected
* Partner non-profit organization financing efforts are consistent with mutually agreed upon policies between the UWSWOK and the partner non-profit organization
* The UWSWOK is fully informed and supports, in advance, special financing efforts undertaken by the partner non-profit organization

To approve funding of a partner non-profit organization requires a 2/3 vote of the members of the Community Investment Committee, Executive Committee, and approval of the UWSWOK Board of Directors. **Application must be turned in by April 30th of each year in order to be considered for United Way Funding during the following campaign.**