



CRITERIA FOR ADMISSIONS GUIDELINES

Nonprofit Organizations receiving funding through United Way Southwest Oklahoma (UWSWOK) are known as Funded Partners and/or Member Agencies. Member Agencies must:

1. Have 501(c)(3) Nonprofit in Good Standing Status

Funded Partners must be legally compliant at both state and federal levels. Eligible organizations have active tax-exempt status by the Internal Revenue Service (IRS), have a 501(c)(3) status, and be in compliance with State of Oklahoma charitable registration regulations. UWSWOK has the responsibility to verify that the recipient organization is in good standing. A copy of the Funded Partner's bylaws should also be provided to UWSWOK. The IRS may revoke tax-exempt status if an organization fails to file Form 990 for three consecutive years.

2. Offer Health and Human Service Programs that Focus on United Way Impact Priorities

Funded Partners shall conduct a recognized program of social welfare activity in or for this community and must show evidence to the satisfaction of UWSWOK that it is effectively meeting a major need with no avoidable duplication of the work of other sound organizations and aligns with UWSWOK priorities: Youth Opportunity (Education), Financial Stability, Health and Basic Needs. 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

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

3. Provide Programs and Services in and for UWSWOK Service Area

UWSWOK funds direct program and services to individuals and households located in one or more of the following Oklahoma counties: Caddo, Comanche, Cotton, Kiowa, Tillman, Beckham, Greer, Jackson, Harmon or one or more of the following Texas counties: Collingsworth, Childress.

4. Provides Services Based on Documented Need(s)

Funded Partners program should use data to address an identifiable current need, demand, or challenge in the community. Services which are supported by voluntary dollars should be clearly defined and their impact documented by the organization.

5. Serve without Discrimination

UWSWOK does not discriminate on the basis of race, color, religion, sex (including pregnancy, sexual orientation, and gender identity), national origin, age, disability, genetic information, veteran status, or any other status. All Funded Partners must demonstrate a commitment to equal opportunity and nondiscriminatory practices in the provision of services, employment, volunteer engagement, and governance.

6. Has an Active, Rotating, Volunteer Board that Represents the Diverse Elements of the Community

Funded Partner'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.



7. Has Sound Financial and Program Management

Funded Partners should demonstrate the 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.

8. Agrees to Support and Cooperate with UWSWOK in the Following Areas: (1) Fundraising, (2) Planning, (3) Communications and (4) Allocations

UWSWOK’s relationships with Funded Partners 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.

9. Agrees to Provide Timely Financial and Program Information

Funded Partners share the responsibility of being accountable to the community for the expenditure of voluntary dollars. Regular reporting of financial and periodical program data to UWSWOK on operating costs and income, helps document Funded Partner expenditures and substantiates their validity.

10. Agrees to Inform and Seek Approval for Any Significant Changes to the UWSWOK Funded Programs.

Voluntary dollars are allocated to specific programs through a volunteer lead community investment process. Funded Partner Organizations are obligated to use the allocations to support and operate the programs for which they were designated. If a program has significant changes or is no longer in operation the UWSWOK should be notified. This may affect the Funded Partner Organization’s allocations. UWSWOK should not be expected to assume financial responsibility for any expansion or discontinuation of any program or any Funded Partner Organization’s operations or facilities.

11. Agrees To Collaborate with UWSWOK on Fundraising Efforts

Efforts by Funded Partners to develop sources of revenue should be carried out in such a manner as to ensure that it:

- Does not compete with UWSWOK fundraising efforts
- Will not be adversely affected UWSWOK giving base
- Are consistent with mutually agreed upon policies between UWSWOK and Funded Partners

Approving a New Funded Partner Application requires the recommendation of Community Investment Committee Chairs and Executive Committee and approval of the UWSWOK Board of Directors.

By signing below, I acknowledge that I have read and understand the above guidelines for admission as a UWSWOK Member Agency.

Printed Name

Title

Signature

Date