

UNITED WAY OF BEDFORD COUNTY  
PARTNER AGENCY CRITERIA

I. STANDARD CRITERIA FOR A MEMBER AGENCY

Documentation must be included with funding application. Attach a list of board members, a copy of 501 ( c ) 3 letter & etc.

- A. 501 ( c ) 3, Indicating your tax-free/non profit status (if not currently on file with the United Way office).
- B. Operational and involved Board of Directors (include copy).
- C. Compliance with Title VII of the Civil Rights Act and the Tennessee Human Rights Act. *(Equal Employment and Non-Discrimination Policy that treats all applicants and employees in a fair and non-discriminatory manner without regard to race, creed, color, religion, gender, national origin or ancestry, age (40 and above), veteran status, disability, or any other legally protected status in accordance with applicable law.)*  
  
*This policy should apply to all forms of employment decisions, including but not limited to recruiting, selection, placement, training, compensation, promotion, corrective action, termination, and other terms and conditions of employment of all people in every job classification.*
- D. If fees are charged for services, they must be based on ability to pay/sliding scale.
- E. Programming focus on health and human services.
- F. Annual External Audit or equivalent ( review, compilation, &etc.) and a copy of your 990 form.
- G. Charter of Incorporation and Bylaws submitted to United Way ( if not currently on file with the United Way office). If there has been a change in your bylaws since your last application, include a copy of your new bylaws.
- H. Licensing and accreditation status if applicable.
- I. Requirement that once accepted by United Way as a member agency, the agency will include the United Way logo on signs, printed material and etc. whenever possible.
- J. Submit budget.
- K. Must have two full years of operation before requesting United Way funding unless you are applying for a Venture grant.
- L. Submit your plan for additional fund raising indicating all sources of revenue.

## II. SUPPLEMENTARY FUND RAISING PRACTICES

United Way recognizes that these matters can not all be defined in advance and it is important for most agencies to raise funds in addition to those provided by United Way. However, we ask all agencies, that are a part of United Way of Bedford County, to observe the following restrictions related to supplementary fund raising.

- A. No public/special event types of fund raising in Bedford County from October 1<sup>st</sup> - November 15<sup>th</sup> (this is the traditional time for the United Way to fund raise).  
No corporate/business solicitations in Bedford County from August 15<sup>th</sup>- November 15<sup>th</sup>.  
The corporate/business period applies only to solicitation and not to the sale of product or services.
- B. All fund raising activities must be submitted to United Way in writing ninety days before the activity begins.
- C. That funding proposals will be in full compliance with state and local guidelines.
- D. A full report to United Way summarizing the results of supplemental fundraising activities within sixty days of the conclusion of the activity.
- E. When representing United Way during presentations to groups, an agency may not solicit for designations; nor may United Way agency's contact United Way donors asking for designations to their agency.
- F. Sustaining membership drives are conducted only among related constituencies.

## III. SANCTIONS

In the event that member agencies fail to comply with these guidelines, the the United Way may:

- A. Deny future applications for supplemental fund raising activity.
- B. Consider the amount raised by such fund raising when setting future allocations to the agency.
- C. De-fund the agency.

IV. REDISTRIBUTION OF ALLOCATIONS BETWEEN PROGRAMS

An agency planning to use the United Way funds for a program or purpose other than that for which it was outlined during the allocation process, must obtain **prior** approval from the United Way Board of Directors.

V. APPEAL AND GRIEVANCES

If an agency wishes to appeal the allocations decision of the Board of Directors, then the agency must submit a request in writing to the board no later than fifteen days of the date of the funding notification. Also, the agency has the option of withdrawing its request for United Way funding.

VI. ALLOCATIONS PROCESS

A. An allocations committee, composed of not more than eighteen volunteers, will be responsible for reviewing the agencies' operations, services and budgets. The committee will make funding recommendations to the United Way Board of Directors for final approval.

B. Agencies will be notified in writing of their allocation for the upcoming year. Notifications may also contain any committee recommendations which resulted from the agency review process.

VII. AGENCY ASSISTANCE

The United Way of Bedford County recommends and encourages, whenever possible, that agencies with suitable resources assist other nonprofit agencies with service referrals and management/administrative concerns.