

2025 Funding Expectations & Eligibility Requirements

The United Way Alliance of the Mid-Ohio Valley, Inc. (UWAMOV) recognizes the continually changing nature of human service needs. Additionally, the United Way Alliance of the Mid-Ohio Valley takes our role as steward of donor money very seriously. We engage community volunteers to oversee every aspect of our management and financial systems to ensure that we operate at the highest levels of professionalism and excellence. Each year a committee of community volunteers reviews agency funding applications and makes recommendations to our Board of Directors. Agencies reviewed are evaluated for their overall ability to provide service, as well as their appropriateness for United Way funding.

An agency being considered for United Way support must meet all United Way eligibility requirements. These requirements were adopted by the United Way's Board to ensure all admitted agencies meet legal and organizational requirements. **If an agency does not meet all of the eligibility requirements, it will not be considered for funding.** Therefore, we ask that you review the following information prior to submitting an application.

The following are eligibility requirements and expectations for member agencies:

- The non-profit organization must submit an application for a program(s) that addresses one of the following four identified community needs: If the agency has more than one program, it must complete a separate funding application for each program for which funding is requested. Each application must identify which community need their program addresses. Following are the four funding priorities identified by the United Way Alliance for the FY 2025 funding period:
 - a. Provide a Safe Environment (Safety Net) for People and Families (assist people who need shelter, safety, and access to food);
 - b. Promote Financial Stability and Independence (Move people out of poverty, financial literacy & transportation);
 - c. Education (Enrichment programs designed to ensure children and youth achieve their full potential; and
 - d. Improve People's Health (Affordable health care, mental health counseling, alcohol & drug abuse treatment and prevention, dental care, and general health & wellness)

Each funding application must clearly identify and describe a specific program to address these needs. **Applications requesting funding of general operations will not be considered.**

- The Agency must be a non-profit organization operating a program deemed important by the United Way Board of Directors to the general human care service system of the community and have federal tax-exempt status under IRS Code 501(C)3; OR a non-501(C)3 tax-exempt organization whereby funds are distributed for a specific project that are in the furtherance of United Way's charitable purpose. The organization must have been incorporated for a minimum of two years prior to January 1st of the application year.



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UWAMOV retains discretion and control as to the use of the funds by the funded organization; and the agency must maintain records documenting the funds are in the furtherance of UWAMOV's exempt purposes.

- The Agency must have substantial local presence and programming in the geographic area covered by the United Way Alliance campaign, which includes Calhoun, Jackson, Pleasants, Ritchie, Roane, Wirt and Wood counties in WV, Athens, and Washington counties in OH.

Substantial local presence is defined as a staffed facility, managed program, office, or portion of a residence dedicated exclusively to that organization, available to members of the public seeking its services or benefits. The office may be staffed by volunteers.

- The Agency must demonstrate that it has a responsible governance structure meeting the requirements set forth in the agency's by-laws. Evidence of responsible governance includes, but is not limited to:
 - a. Proof of sound fiscal management
 - b. Adoption and implementation of a conflict-of-interest policy
 - c. Proof of regular board meetings and attendance by board members
 - d. Effective committee structure
 - e. Required board member training
 - f. Budget development and monitoring process
 - g. Substantive and clear meeting minutes
 - h. Periodic review and update of by-laws
 - i. Purchase of officers and directors' insurance
- The Agency must render a service which meets a demonstrated human need; its programs must be of quality and quantity which will justify present and proposed expenditures; its hours of service must be such to meet the needs of the people served; its facilities must be adequate for the purpose for which they are maintained; intake policy and limit of service, geographic and otherwise, clearly defined.
- If the nonprofit's annual revenue is \$500,000 or greater, the nonprofit must provide audited financial statements for the organization covering the fiscal year ending not more than 18 months prior to January 2024. *The audit must express an unqualified opinion and must be conducted by an independent Certified Public Accountant in accordance with Generally Accepted Auditing Standards (GAAS) and Generally Accepted Accounting Principles (GAAP).*
- For organizations with annual revenue between \$100,000 and \$500,000, a compiled financial statement with footnote disclosures prepared by an independent certified public accountant is required. Organizations with less than \$100,000 may provide an internally generated balance sheet and income statement. Statements for the organization must cover the fiscal year ending not more than 18 months prior to January 2024.

- Provide a copy of the most recently completed and signed IRS Form 990 covering the fiscal year ending not more than 18 months prior to January 2024. If the organization is not required to file a full IRS Form 990, documentation to substantiate that must be included with the application.
- Have a policy and demonstrate a practice of non-discrimination as it relates to the operation of the organization, including service delivery, on the basis of race, creed, color, religion, gender, age, national origin, physical or mental health, sexual orientation or any characteristic protected by law.

All applicant organizations must submit a copy of their non-discrimination policy as described above, signed by an officer of the organization. The policy must include those classifications listed above.

- Comply with applicable federal, state, and municipal laws and regulations. This includes, but is not limited to, compliance with individual state registration requirements for charitable solicitation, maintenance of all agency and individual licensures, submission of annual Form 990, timely payment of all payroll taxes, and filing of payroll tax returns. Copies of current regulatory licenses must be provided with funding application.

In addition to the information required above, the Community Investment Committee may consider the following when making funding decision:

- Did the non-profit collaborate with other agencies (funded and non-funded) in preventing a duplication of effort and in promoting effective service, efficiency, and economy of administration?
- Did the non-profit utilize all opportunities to inform the public of the mutual values of United Way partner relationships to the community and to identify itself in every practical manner as a recipient of community support through the United Way by display of the United Way insignia on its property, offices, stationary, publications, and through other procedures that would be mutually beneficial in the promotion of United Way? Did the organization also use the "United Way Community Partner" logo in accordance with United Way brand guidelines? These guidelines and logos are provided by UWAMOV. United Way funded partners are strongly encouraged to conduct an in-house United Way campaign among staff, board members or other stakeholders, and actively participate in events and activities hosted by United Way. Funded partners should attend four partner workshops annually; if the agency executive is not available, a representative of the agency should be in attendance with the intent of communicating all information to the agency executive. In the event of extenuating circumstances that will cause an absence from a scheduled partner meeting, it is imperative that the agency executive communicate that situation in advance with United Way staff;
- Did the non-profit make effective use of volunteers, wherever possible, consistent with its program and mission?
- An organization/ agency must have the following policies in place, preferably highlighted on their website with download or printable capability.
 - Diversity, Equity, and Inclusion statement
 - Anti-racism / Ethnic Discrimination statement

