



United Way of Lee County, Inc.

ADMISSION GUIDELINES

In order to be considered for United Way funding, an organization must:

1. BE INCORPORATED, NOT-FOR-PROFIT, AND BE DESIGNATED BY THE I.R.S. AS TAX EXEMPT AND APPROVED FOR TAX DEDUCTIBLE DONATIONS (excepting Governmental Agencies).

Explanation: Agencies receiving United Way dollars must be not-for-profit organizations that have been declared tax exempt by the Internal Revenue Service (I.R.S.) or have a 501 (c)(3) tax deductible purpose. Evidence of compliance with state charitable regulations must be provided, where applicable. A copy of the agency's by-laws must also be provided to the United Way.

2. OFFER HUMAN SERVICE PROGRAMS FOR RESIDENTS OF LEE COUNTY.

Explanation: These "human service programs" are generally limited to health, education, welfare, and youth guidance programs. United Way funded agencies must meet the tests of accessibility (e.g., location of the facility) and availability (e.g., frequency and times of operation).

3. PROVIDE COMMUNITY SERVICE BASED ON DOCUMENTED NEEDS.

Explanation: The agency/program must address itself to an identifiable current need, demand, or problem in the community. Services which are supported by voluntary dollars must be clearly defined and their target documented by the organization. They must be offered to a target population or geographic locale not presently served by existing programs.

4. BE NON-DISCRIMINATORY.

Explanation: Discrimination by race, creed, color, national origin, handicapping condition, sex, age, or religion must be prohibited in programs, services, and employment practices. A written affirmative action plan for employment of staff would reinforce compliance with the Equal Opportunity Act of 1972, as amended.

5. HAVE AN ACTIVE, ROTATING, VOLUNTEER LEADERSHIP THAT REPRESENTS THE DIVERSE ELEMENTS OF OUR LOCAL COMMUNITY.

Explanation: The agency's Board of Directors or governing body must consist of volunteers who participate in the policy-making processes, represent the diverse elements of the community, periodically rotate off the Board and meet at least quarterly. Members of the volunteer structure must not receive financial remuneration from the program(s) or service(s) they oversee.

6. HAVE SOUND FINANCIAL AND PROGRAM MANAGEMENT.

Explanation: Demonstrated ability to manage the finances of the program/services in accordance with generally accepted accounting procedures is critical to United Way support. The organization must provide a copy of its annual audit using an independent public accountant or accounting firm or provide a sworn financial report.

7. HAVE ESTABLISHED REASONABLE CONTINUITY AND PERFORMANCE IN THE COMMUNITY.

Explanation: Demonstrate that the agency has a physical presence in the community and supported itself financially for 2 years or such other period as may be determined by the Board of Directors.

8. AGENCY AGREES TO INFORM AND SEEK APPROVAL FROM THE UNITED WAY FOR ALL SIGNIFICANT PROGRAM/STAFF EXPANSION OR REDUCTION THAT MAY AFFECT THE AGENCY'S ALLOCATIONS.

Explanation: The United Way should not be expected to assume financial responsibility for any expansion or discontinuation of the agency's operations or facilities without prior approval and discussion of how this action will affect the agency's allocation, if at all.

If an organization meets these minimum requirements, it may then be considered for United Way funding. However, eligibility determination does not necessarily result in United Way funding. The amount of available dollars, the urgency of existing needs, and other key variables are important to the United Way citizen review process and the final funding decision.

If an organization is accepted as a United Way member agency, it must agree to:

1. SUPPORT AND COOPERATE WITH THE UNITED WAY IN THE FOLLOWING AREAS: (1.) FUND-RAISING, (2.) PLANNING, (3.) COMMUNICATIONS, AND (4.) ALLOCATIONS.

Explanation: The United Way's relationship with agencies is 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.

2. PROVIDE TIMELY FINANCIAL AND PROGRAM INFORMATION.

Explanation: Agencies share the responsibility of being accountable to the community for the expenditure of voluntary dollars. Periodic reporting of financial and program data to the United Way on operating costs and income documents, agency expenditures that substantiates their validity.

3. OBTAIN PRIOR APPROVAL FROM THE UNITED WAY BEFORE ENGAGING IN ANY SUPPLEMENTAL FUND-RAISING EFFORT.

Explanation: Agencies must obtain prior approval from the United Way regarding capital and supplemental fund-raising needs. Efforts by agencies to develop sources of income must be carried out in such a manner as to assure that:

- the United Way giving base in the community will not be adversely affected.
- agency financing efforts are consistent with mutually agreed upon policies between the United Way and the agency; and
- the United Way is fully informed and supports, in advance, special financing efforts undertaken by the agency.