

Policy for Partner Agency Renewals and Applications  
United Way of Iredell County  
Policy Number 15-05-31

The United Way of Iredell County is committed to maintaining a high degree of accountability for the dollars invested in local agency programs and services. At the same time we recognize the importance of continuity in the services people across our community come to rely upon to meet their education, income and health needs. The following policy for periodic renewal of partner agency status is an attempt to balance between these values while maintaining a process that is open, transparent and equitable.

United Way Partner Agency Status:

The only organizations allowed to apply annually for grants from the United Way Annual Campaign are those agencies who have been designated as official Partner Agencies. Being a partner agency does not guarantee funding in any particular grant cycle, but it is a necessary pre-requisite to be eligible to apply.

In addition to grant funding Partner Agencies may receive additional benefits from the United Way which can include: marketing and promotional support, technical assistance, staff development, access to special pricing or services and inclusion in a network of affiliated organizations.

Requirements for Partner Agency Status:

United Way and each of its Partner Agencies are required to maintain the following standards:

1. Be incorporated or chartered under federal and North Carolina state statutes.
2. Be recognized as an organization exempt from federal income tax under IRS Section 501(c)(3) Internal Revenue Code 1954, as amended, and as a publicly supported organization of the type described in Section 170(b) (1) (A) (vi).
3. Submit required tax and solicitation licensure documents in a timely and complete manner.
4. Be primarily involved in providing program(s) and services that are health, education or human service related and directly serve Iredell County residents and employers.
5. Have an independent governing body consisting of at least six voting members who are citizen volunteers, preferably including at least one resident of Iredell County, that has the authority to decide policy and strategic direction with respect to the agency's programs, administration and finances, in accordance with the organization's by-laws, and who shall meet at least four times per year. Members of an independent governing body do not engage in transactions in which they may have material conflicting interests resulting from any relations and/or business affiliation. Paid staff must not be a voting member of the Board.
6. To provide needed services and operate free from discrimination based on race, color, sex, age, religion, physical or mental disability, national origin or any other personal characteristic protected by federal, state or local law. The non-discrimination policy shall apply to staff, governing body, committees, and people that are directly and indirectly served. This commitment to non-discrimination is subject to appropriate limitations based on either United Way's or an Agency's mission and designated scope of services.

7. Have an annual audit (financial review acceptable for agencies with budgets of less than \$250,000 with prior approval from United Way) performed by a certified public accountant, in accordance with the standards of accounting and financial reporting for voluntary health and welfare organizations and with American Institute of Certified Public Accountants (AICPA) Standards, and adhere to AICPA accounting standards.
8. Demonstrate adequate understanding of community needs in Iredell County and services currently being provided and work in concert with existing programs in the best interest of program clients to the extent possible. Demonstrate that there are adequate benefits to both the agency and the United Way from an affiliation.
9. Maintain and provide adequate documentation to show the impact of program services being provided upon the clients served and align program deliverables to one or more of the United Way of Iredell County strategies for community impact.
10. Comply with United Way of Iredell County policies regarding co-branding, run a high quality employee giving campaign at your location and participate in United Way sponsored events as possible.