



GEN 041 – AGENCY PARTNERSHIP REQUIREMENTS

Statement of Policy: It is the policy of the United Way to build a better community through partnering with nonprofit agencies who meet the health, education, and financial needs of the community and to set measurable standards to ensure that those needs are being met. The United Way considers the following for agency partners:

1. community needs;
2. program content;
3. agency standards of performance;
4. availability of services through existing agencies;
5. validated financial need;
6. available funds for adequate support of present and proposed programs; and
7. community volunteerism.

Statement of Responsibility: It is the responsibility of the United Way to ensure that partner agencies adhere to the standards set forth in this policy.

Policy

To be eligible for United Way funding through the Community Care Fund, organizations must demonstrate that they meet the following requirements:

A. Minimum Standards and Requirements

Failure to meet the following minimum standards and requirements may result in loss of United Way funding. These requirements are subject to waiver on a case-by-case basis. Any defects must be corrected by the agency.

1. Agencies:

- a. are located in the State of Alaska and deliver substantial human services to residents of the Tanana Valley which align with United Way and community priorities;
- b. are a tax-exempt charitable organization such that contributions are tax-deductible to the donor;
- c. are not of an exclusively religious nature;
- d. have been in operation for a period of not less than three (3) years prior to submitting its application for admission;
- e. are overseen by a volunteer board of directors; and
- f. 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.

2. The agency employs professional staff, as needed, who are qualified to carry out its programs.
3. The agency must give evidence of budget and program control and demonstrate that the board of Directors periodically reviews the budget and programs provided and makes changes as necessary.

4. Standards of Administration

a. Governance

- i. Agency has a Board of Directors or, if a chapter of a statewide or national agency, a local Advisory Board;
- ii. Board consists of at least five (5) members;
- iii. Board Directors serve without compensation;
- iv. Board meets regularly, at minimum, four (4) times per year;
- v. Board composition is representative of the community at large;
- vi. New board members receive an orientation on their agencies and the roles and responsibilities of board service;
- vii. Board conducts an annual self-evaluation; and
- viii. Board takes part in formulating and reviewing agency goals and objectives.

b. Staff

- i. Personnel policies and job descriptions are approved by the board and made available to the staff;
- ii. The Executive Director is evaluated annually by the Board;
- iii. Key staff members are offered continuing educational opportunities;
- iv. Key staff members have job descriptions and are evaluated annually by supervisors; and
- v. Key volunteers have job descriptions

c. Budget (non-military agencies)

- i. Compilation, review, or audit is conducted by a CPA every year;
- ii. Financial Internal Control checklist is periodically reviewed and approved by the Board of Directors;
- iii. Total administrative and fundraising costs should not exceed 25% as measured on the IRS form 990;
- iv. Operating reserves do not exceed one year of agency budget; and
- v. Chapter agencies must be able to provide site-specific financials, to ensure that the agency is able to provide services to meet priority needs in the Tanana Valley.

d. Programs

- i. Agency provides services to meet priority human needs in the Tanana Valley which align with United Way funding priorities (health, education, financial stability);
- ii. Agency does not duplicate programs provided by an existing agency;
- iii. Agency regularly measures and evaluates program outcomes; and
- iv. Agencies work in collaboration where possible to address community needs.

5. United Way Participation

Partner agencies of the United Way of the Tanana Valley are required to:

- a. Promote the United Way of the Tanana Valley partnership by:**
 - i. Utilizing the United Way logo in agency literature, media efforts, on agency premises, and in other communications with the public;
 - ii. Linking the United Way logo on website homepage and other electronic media to unitedwaytv.com; and
 - iii. Acknowledging agency’s partnership with the United Way of the Tanana Valley where possible.

- b. Actively participate in the United Way of the Tanana Valley annual campaign by:**
 - i. Conducting and encouraging an employee campaign among agency staff;
 - ii. Promoting and supporting the annual campaign by providing senior staff to speak at workplace presentations when requested, soliciting agency board members to conduct workplace campaigns, and participating in public campaign events; and
 - iii. Acting in service to other United Way partner agencies by not promoting agency designations (donor option) internally or externally, or by conducting non-United Way payroll deduction fundraising campaigns.

- c. Actively participate in the United Way of the Tanana Valley by:**
 - i. attending the bi-monthly United Way Partner Agency Leadership meeting;
 - ii. collaborating with other United Way Partner Agencies; and
 - iii. responding to requests for information and other opportunities as they arise.

B. General Standards and Requirements for Military Sponsored Organizations

- 1.** In lieu of the requirements listed in section C, Military Sponsored Organizations may be eligible for support by virtue of supplying the following documents certified by the Commanding Officer in charge of the military installation:
 - a. a mission statement of the agency together with identification of positions responsible for the operation of the agency on a continuing basis;
 - b. the existence of an advisory board assisting in the direction of the agency, including budget and program matters. The board must meet regularly (four or more times each year), be representative of the military community served, and for which there are provisions to appoint new members when a member ceases to participate;
 - c. a declaration that the agency complies with generally accepted accounting principles;
 - d. a copy of an income and expense statement which shows the disposition of United Way and other funds allocated to the agency; this shall be in whatever form is accepted and used by the Armed Forces of the United States of America in dealing with this agency.
 - e.

C. Eliminating a Partner Agency

1. The United Way Board of Directors may review and take action on an agency's partnership based on their compliance with the standards set forth in this policy.
2. Failure to meet these minimum standards may result in the loss of United Way agency partnership status.
3. If the United Way Board of Directors has reason to believe a partner agency is experiencing financial or managerial difficulties, or the Board has concerns that an agency is not actively supporting or participating in the United Way as laid out in this policy above, the Board will undertake an investigation.
4. The Board shall see that the subject agency is notified in writing of the suspected non-compliance. Simultaneously with this notice, the United Way may suspend allocation payments until the Board approves to resume allocation payments.
5. If preliminary findings conclude that the non-compliance issues are of a sustained and/or serious nature, the Board will evaluate the situation and identify specific problems.
 - a. The Board will recommend corrective measures to the non-compliant agency in writing and establish deadlines for implementation of these measures.
 - b. During the process of implementing corrective measures, the United Way will serve as a resource for the agency.
6. At the end of the implementation period, the Board will review the agency's progress toward correcting the identified non-compliance issues. If the Board feels that agency has still not satisfactorily met the standards of the United Way's Agency requirements, the Board will consider whether to retain the agency as a United Way partner.
7. If the United Way Board of Directors votes to eliminate the agency from United Way partnership, the agency will receive immediate notice and allocation payments will immediately cease.
8. If extenuating circumstances arise, the relationship between a partner and the United Way of the Tanana Valley may be terminated by a majority vote of the Board of Directors. A partner may terminate their relationship with the United Way of the Tanana Valley at will.
9. No agency that requests a withdrawal or is terminated involuntarily may apply to become a United Way partner for a period of two (2) years following the date on which the partner's request for withdrawal was accepted by the United Way Board.

End of Policy

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