



## ***United Way of Nevada County***

### **Criteria and Responsibilities for Partners**

The United Way of Nevada County Board of Directors, in its role as a coalition-builder to improve lives in Nevada County, acts on an annual basis to establish a set of priority human service needs as a focus for the *Annual Campaign*. *Campaign* proceeds will be allocated to these needs, and/or to selected partner organizations addressing these needs, according to the *Criteria and Responsibilities* explained below.

A companion document, the *United Way of Nevada County Fund Distribution Policy*, explains the process involved in allocating Campaign proceeds to partner organizations and projects. The UWNC Board will annually, in May, announce how prior-year Campaign proceeds will be “allocated” to address the Board’s identified priority community needs. Allocations will be divided by percentage between *partners* addressing priority community needs and *projects* of one or more years in duration which pursue goals directly related to the UWNC Board’s announced priorities.

UWNC seeks to establish partnerships with agencies, commissions, organizations, schools and local government and to use these partnerships to address priority needs as these are identified by the UWNC Board. Within these partnerships, UWNC expects to fund those agencies who meet the criteria as “Funded-Partners” outlined below.

#### **Priority Human Service Needs**

*To target effectively the allocation of Annual Campaign proceeds, the Board of Directors for United Way of Nevada County in June annually identifies local needs which:*

1. Have been identified in a community assessment process accepted by the Board as a source for valid local needs information;
2. Meet the Board’s definitions as a human service need, the effects of which can be mitigated through one or more years of collaborative effort from within the County’s non-profit, governmental and business leadership;
3. Are recognized, by local media and County leadership, as high priority issues limiting the quality of life in our community.

## **Partnership Criteria**

*United Way of Nevada County seeks partner organizations which:*

1. Support human services within Nevada County;
2. Have a public record as a lead or collaborating organization in efforts to address an identified human service need in the County;
3. Maintain offices and have served clients within Nevada County for three years;
4. Have a Board of Directors or Advisory Council making decisions under a written policy of non-discrimination covering race, color, religion, gender, sexual orientation, national origin or ancestry;

To receive an ALLOCATION (a distribution from UWNC Annual Campaign proceeds), an agency must first be approved by the UWNC Board of Directors as a **Funded-Partner Agency**.

## **Funding Criteria, Part I**

*United Way of Nevada County Funded-Partner Agencies shall:*

1. Have as a stated Mission the provision of services which address human service needs in alignment with the **Priority Needs** named by the Board for the current allocation period.
2. Maintain written record of service to clients within Nevada County; and demonstrate that the public is willing to support the agency in a significant way, such support to be indicated by clear record of financial support and volunteer efforts from within the community.
3. Maintain accurate data for client service (“outcomes”) or service projects (“outputs”) in Nevada County. Furnish documented reports to United Way as requested.
4. Demonstrate that United Way of Nevada County financial support is needed in addition to income which can be generated from fees, memberships, grants, and other fundraising activities. Demonstrate United Way of Nevada County financial support is not in excess of 50% of the member agency’s gross revenue.
5. Have a written policy of non-discrimination and provide services without regard to race, color, religion, sex, sexual orientation, national origin, or ancestry.
6. Not engage in political or lobbying activities as a significant part of their programs.
7. Have operated in Nevada County for three consecutive years or more.

## **Funding Criteria, Part II**

*United Way of Nevada County Funded-Partner Agencies shall:*

1. Be exempt from taxation under Internal Revenue Service Code 501 (c)(3) and Section 2370 (id) of the California Revenue and Taxation Code; or be operating not-for-profit.
2. Have written, up-to-date by-laws or other documentation setting forth the operating rules of the organization.
3. Be governed by a Board of Directors or an Advisory Board, which meets regularly and has Nevada County representation.
4. Have duly elected or appointed officers who are accountable for the management and financial affairs of the organization.
5. Have current licenses, permits, and required approvals from all local, state, and national regulatory authorities having jurisdiction over its operations.
6. Disclose the nature of affiliations within its own organization and with other organizations.

## **Financial Reporting and Record Keeping**

*United Way of Nevada County Funded-Partner Agencies shall:*

1. Follow generally accepted accounting principles or another comprehensive basis of accounting in recording and reporting the financial transactions of the organization.
2. Prepare, at least quarterly, a statement of financial position, including a balance sheet and a statement of activity.
3. Prepare an annual budget and have it available for public review.
4. Demonstrate that all required local, state, and federal reports are filed in a timely manner.
5. As part of the *Allocation Application* process, be prepared to submit a copy of the current audit, basic financial statements, copies of Bylaws, Board Minutes and other pertinent information as requested.

## **General Provisions**

*Agencies seeking Partner or Funded-Partner status shall be prepared to:*

1. Submit application and/or general supporting information in the manner prescribed by United Way of Nevada County.
2. Conduct their public relations program in a manner which clearly and consistently identifies them as a United Way of Nevada County member agency.
3. Agree to support the United Way of Nevada County Annual Campaign, making available volunteers and professional leadership, and such other services as may be reasonably required to insure the success of the United Way of Nevada County fundraising campaign.
4. Maintain equal access for all people to all agency facilities and activities and make every effort to people with disabilities equal access to all agency information (i.e., website) and presentations.
5. Not conduct independent fundraising activities during the United Way of Nevada County *Direct Mail Campaign* period of September 15th through October 15th of each year, without prior written approval of United Way of Nevada County. Agencies conducting fundraising activities in the name of "United Way of Nevada County" must obtain prior approval of the UWNC Board.
6. Promptly give notice to United Way of Nevada County of any litigation pending or threatened against the member agency.

Note: *The Board of Directors of United Way of Nevada County, Inc. reserves the right to deny the membership, or to withdraw the membership at any time, of any organization whose membership the Board, in its sole discretion, determines to be not in the best interest of United Way of Nevada County.*