

ADMISSION TO AGENCY PARTNERSHIP STATUS

Organizations shall apply for agency partnership status with United Way GCR and be approved by the Board of Directors subject to the recommendation of the Admissions Committee and the following standards of admission and partnership:

Section 1. Standards of Admission

- a. The organization or agency must perform a needed service through the operation of an ongoing program in the field of health and human welfare and development within the boundaries of Houston, Montgomery and Stewart Counties, Tennessee, the geographic area served by the United Way GCR.
- b. The organization or agency must have a local presence in the geographic service area of United Way GCR, which area encompasses Houston, Montgomery and Stewart Counties, Tennessee. Local presence is defined as:
 - (1) having a staffed facility, office, or portion of a facility dedicated exclusively to the work of that organization located in Houston and/or Montgomery and/or Stewart County; or
 - (2) having such local facility, staff or volunteers available to the public seeking its services at least 20 hours a week; and
 - (3) having a local telephone dedicated exclusively to the organization.
- c. A partner agency must have a voluntary Board of Directors with local representation consisting of responsible individuals who have reasonable and active control over its operation and whose officers are not paid employees of the agency.
- d. The agency must be incorporated as a non-profit organization in the State of Tennessee and register annually with the Division of Charitable Solicitations, or provide proof of exemption from such annual registration.
- e. The organization must be a tax-exempt, non-profit organization under 26 U.S.C. 501 (c)(3) of the Internal Revenue Service Code and to which contributions are tax deductible pursuant to 26 U.S.C. 170.
- f. The organization must operate in compliance with and maintain its facility(ies) in accordance with all applicable local, state, and federal laws, regulations and codes. Each organization is responsible for knowing which laws, regulations and codes are applicable to it and its operations.
- g. The organization must, by written contractual agreement, accept the purpose of United Way GCR, as set forth in Article II of these Bylaws, and agree to abide by the standards of admission and partnership, as set forth in Articles IV and V of these Bylaws and the United Way GCR application forms and contract, understanding and agreeing to the consequences of non-compliance set out therein.

Application for Admission

- a. An organization desiring to attain partnership status and be eligible to receive support through the United Way GCR shall request an application packet in writing and submit the application and all required accompanying documentation for admission to United Way GCR no later than **application deadline date** of each year. Such applications shall include, but not be limited to the following:
 - (1) A statement that the governing board or other policy-making body of the applicant is familiar with the provisions of the Bylaws of United Way GCR, has voted to apply for partnership status, and agrees to cooperate with the United Way GCR and other partner agencies in furthering the purposes and objectives of the United Way GCR.
 - (2) A detailed statement about the organization, including, but not limited to its: history and age; mission statement and purpose; an accurate description of its past and current programs and services in Houston and/or Montgomery and/or Stewart County; and its desires and plans for future activities and/or programs.
 - (3) Information on the organization's annual and long-term goals and objectives for their program and/or services, including detailed data on the population served and outcome measures showing the scope and volume of such services, levels of benefits derived by those served and results obtained by the organization's program and/or services.
 - (4) Complete financial information for the organization, including, but not limited to:
 - (a) its most recent certified external audit and management letter for organizations with revenues in excess of \$250,000 annually; or, for organizations with annual revenue totaling less than \$250,000, its most recent Financial Review conducted by an independent public accounting firm in accordance with the standards of the American Institute of Certified Public Accountants (AICPA);
 - (b) the most recently completed IRS Form 990
 - (c) a detailed statement of its current assets and liabilities;
 - (d) full financial statements, including all revenue sources and expenditures, for the last three fiscal years (*if the organization has not existed for three years, full financial statement for the years or year immediately preceding the application submission must be provided, if it has, in fact, existed for at least one year*); and,
 - (e) the proposed budget for the upcoming fiscal year, approved in writing by its governing body.
 - (5) A list of the names, affiliations, and addresses of its current officers and directors.
 - (6) A list of contributors and amounts contributed during the previous year and the current year to date. If such a list is not available, an explanation of its unavailability shall be provided.
 - (7) A copy of the most recent determination letter from the District Director of the Internal Revenue Service, or from another appropriate official of the Service, showing the organization is tax exempt under 26 U.S.C. 501(c)(3) and that contributions made to it are tax deductible pursuant to 26 U.S.C. 170, and a signed certification that the organization's tax exempt status has not changed or been revoked.

- (8) A copy of the organization's policy or signed statement affirming that it is the policy of the applicant not to discriminate on the basis of race, creed, color, age, gender, religion, or disabling conditions in its employment practices or in rendering its services and a signed statement certifying that its practice in regards to its personnel and in rendering these services is in conformation with this.
 - (9) A statement that the organization will not contribute to any organization or organizations operating in the geographic service area of United Way GCR, nor will it contribute to any organization or organizations operating in other areas, without express written consent of United Way GCR.
 - (10) An agreement that those engaged in the work of the organization will actively participate in the United Way GCR campaign, perform those services called for by United Way GCR, providing such requests for services are reasonable, and work in cooperation with the United Way GCR and partner agencies to address community needs and issues in the most effective, efficient manner possible.
- b. An organization desiring to attain partnership status shall submit with its application forms the completed, signed and dated original copy of the partnership contract with the United Way GCR, certifying the organization's understanding and intention to comply with all standards and requirements of this partnership.