

United Way of Southern Chester County (UWSCC) Policy on Eligibility for Partner Agencies

Date of Board Approval: 2022	Supersedes: 11/12/14		
Dates Reviewed by Policy Committee:	09/2022		

PURPOSE: Document the policy defining the requirements for an Agency to be considered for funding.

POLICY STATEMENT: UWSCC considers for funding only those Agencies who meet the requirements set forth in the Governance and Procedures section of this Policy below.

GOVERNANCE AND PROCEDURES: UWSCC requires that an Agency meet the following requirements for funding consideration. The Agency shall:

1. Provide “human health and social service” programs (See “Explanations” below) which meets a documented community need for people who live within the UWSCC area which encompasses the school districts of Avon Grove, Kennett Consolidated, Oxford Area, and Unionville/Chadds Ford. There is a preference for programs that provide a service that is not duplicative of an existing funded program in the area to be served. Duplication of services is not discouraged where a program is offered to a different segment of the local area’s population or when there is a need for added or enhanced service in the local area served.
2. Demonstrate a reasonable degree of continuity and an economical, effective and efficient operation by being an incorporated not-for-profit organization in operation for at least two years or having been a UWSCC-funded program for at least two years through a current partner agency of UWSCC.
3. Meet the qualifications for Federal Income Tax exemption as set forth under Section 501(c)(3) of the Internal Revenue Code of 1954, as amended or superseded from time to time, as an organization that is not a private foundation. No part of the Agency income should inure to the private benefit of any of its members. All income should be used for the stated purpose of the Agency.
4. Be registered with the Commonwealth of Pennsylvania, Department of State, Bureau of Charitable Organizations, or have a letter of waiver.
5. Have a governing body composed of volunteers, which is duly elected, provides for rotation of membership, holds at least four scheduled meetings annually, has final authority with respect to all policy matters, and maintains minutes of its meetings.
6. Adhere to a budget approved by its governing body, and maintain appropriate accounting records and controls over the receipt and expenditure of funds that meet the accounting standards as promulgated by the American Institute of Certified Public Accountants.
7. Have an annual audit or financial review within 180 days after the close of the Agency’s fiscal year depending on the Agency’s gross contributions. UWSCC reserves the right to inspect an Agency’s financial statements at any time. The following thresholds match the Pennsylvania Bureau of Charitable Organization’s thresholds.
 - a. If an agency receives less than \$50,000 in gross contributions in a fiscal year, it may provide UWSCC with internally prepared statements. It must permit a volunteer from UWSCC to inspect their books and records.

- b. If an agency receives between \$50,000 and \$100,000 in gross contributions in a fiscal year, it may provide UWSCC with a compilation from a public accountant or a review by a Certified Public Accountant in lieu of an independent financial audit.
 - c. If an agency receives between \$100,000 and \$300,000 in gross contributions in a fiscal year, it may provide UWSCC with a review by a Certified Public Accountant in lieu of an annual independent financial audit.
 - d. If an agency receives \$300,000 or over in gross contributions in a fiscal year, it must provide UWSCC with an annual independent financial audit from a Certified Public Accountant.
8. Have a written board-approved policy, stating that the Agency does not discriminate with respect to board members, staff, or volunteers, or in its recipients of services on the basis of age, race, religion, color, gender, disability, national or ethnic origin, ancestry, marital status, family status, sexual orientation, gender identity or expression, or veteran status or any other characteristics protected by law. Organizations which offer services designed to address the needs of targeted populations may not, in and of themselves, be considered discriminatory and will be considered for funding.
 9. Not require recipients of their services to attend informational or educational sessions that espouse a specific philosophical viewpoint. Any optional invitation to such sessions or informational literature regarding such philosophical viewpoints must be extended with a clear understanding that the recipient's eligibility for services is not dependent on their acceptance.

The United Way-Partner Agency Agreement must be signed jointly by the agency and UWSCC.

Explanations: The following are examples of the major programs and activities that are included within the meaning of "human health and social services" as used by UWSCC:

● Food, clothing and housing supports	● Crime and delinquency prevention and offender rehabilitation
● Disaster services	● Emergency care
● Employment support, including job training	● Family preservation and strengthening
● Health education, maintenance and treatment	● Drug and alcohol abuse prevention programs
● Human growth and development	

Exclusions: Since UWSCC's purpose is to fund health and human service programs, the following organizations, though deserving of public support, are deemed ineligible for funding by UWSCC. Exceptions can be made to support human health and social service programs of these organizations and that meet the criteria above upon approval of the Allocation Committee of UWSCC.

● Religious institutions	● Libraries without literacy programs
● Schools and educational organizations	● Volunteer fire companies without ambulance or rescue services
● Animal welfare groups	● Peace organizations
● Environmental groups	● Government agency services
● Economic development organizations	● Museum and cultural agencies
● Sports leagues and camps	● Fraternal organizations
● Political organizations	

REVIEW OF POLICY: This policy shall be reviewed and approved by the UWSCC Board of Directors. Thereafter, it will be reviewed and updated by the Policy Committee at least every three years or as regulations and/or methods of operation change.

DOCUMENT RETENTION: Documentation concerning this policy will be retained for seven (7) years.