UNITED WAY OF NORTHWEST GEORGIA

**Eligibility Requirements and Standards for Financial Support**

1. The partner shall perform a needed service in the field of health, basic needs, and education.
2. The partner shall be incorporated under the laws of the State of Georgia or other jurisdiction meeting Georgia Standards, as a non-profit voluntary organization.
3. The partner shall have a ruling from the United States Treasury Department that it has qualified as a 501 C 3 organization and that gifts to it are deductible for income tax purposes and shall submit a copy of such determination to this United Way.
4. The partner shall maintain a representative and responsible governing board or body of at least five (5) individuals with active control over its operations which serves without compensation.
5. The organization shall have an appropriate policy to provide services without discrimination.
6. The partner shall use only those methods of securing other income which are acceptable to the United Way.
7. The partner shall cooperate with the United Way in the review of the partner's programs, services and budgets. It shall furnish such data as may be required by United Way for such reviews.
8. The partner shall make available on request a copy of an auditor's report to be prepared by an independent CPA in accordance with generally accepted auditing standards or a substitute acceptable to United Way.
9. At the time of its application for support, the partner shall have a satisfactory plan for meeting any prior indebtedness, and agencies with buildings shall have the property in a good state of repair.
10. The partner shall have a program which has demonstrated its usefulness and support from the community for, normally, a period of at least two years prior to consideration of the application for support.
11. A substantial share of the partner's program shall fall within the United Way priority classification.
12. Services must be rendered to all or some part of the area of solicitation of funds for the United Way and shall generally meet a need not filled by an existing partner or agencies and one which cannot appropriately be performed by an existing United Way partner.
13. The partner shall cooperate with other agencies in preventing a duplication of effort and in promoting effective service, efficiency and economy of administration.
14. The partner shall conduct an intensive year-round program of interpretation and education in cooperation with the United Way; to identify itself in every particular manner as a recipient of United Way support through display of United Way insignia on its property, offices, stationery, publications, and through other procedures which would be mutually beneficial in the promotion of the United Way.
15. Partner support shall be considered provisional during the first two years of support. Continuing support shall be subject to evaluation which shall take place prior to confirmation by the United Way.

\serdev\policy\ersfs.doc

**Questions Management Should Be Prepared To Answer Orally**

**People Resources:**

1. Does your staff have the necessary qualifications and training to deliver the services necessary to achieve your goals and objectives? Describe any staff involvement in training programs.
2. How many people do you need to volunteer to accomplish your mission? Approximately how many volunteers do you presently have serving your agency other than board activity?
3. What sources will you use to encourage people to volunteer? Who is responsible for this effort? Who will establish a plan to make this a successful venture in expanding volunteer service?
4. How will you set up measurements and responsibilities to insure that you have the appropriate number of people?
5. Volunteers come and go, sometimes leaving at the most critical times. Who will be responsible for getting replacements? How many “reserves” do you feel you might need?
6. How will the volunteers be trained? Who will be responsible for their initial training? Who and how will you train the “reserves”?
7. What does your board accomplish?

**Financial Resources:**

1. What is the amount of your financial budget? Who is to be responsible for the financial budget goal? What methods will be used to raise these dollars?
2. To accomplish your goals, who is to assume the responsibility for the allocations of these funds?

How often will these goals be reviewed?

To whom and how often will they report?

1. If a budget spending problem develops, what system is in place to assure a quick resolution? Who is responsible?
2. What type of cost control is set up to get the maximum benefit out of the services your agency provides? Who will be responsible for setting up this control? How will these persons be measured? To whom will these persons be made accountable? Will there be a regular monthly financial report and who will receive the report?
3. What was your revenue for the past three years from: United Way? Government Agencies? Fund Raising? Other?
4. What percentage increase is projected for expenses next year? For that increase, what percentage is United Way being asked to fund? Are these increases due to major capital expenditures? If so, what are these capital expenditures?
5. For the past three years, what were the total administrative costs of the budget and percentages of each year’s budget? What are the projected administrative costs and percentages of next year’s budget?