



Partner Agency Eligibility Policy

Overview

This policy, established by the Board of Directors of United Way of Story County (UWSC), sets forth requirements for organizations to be granted and to maintain UWSC Partner Agency status.

A Partner Agency is an organization that meets the UWSC's current agency eligibility criteria and has been approved for partnership by the UWSC's Board of Directors. Partner Agencies are eligible for all benefits of partnership and responsible for all terms and conditions as outlined in the UWSC's annual Partner Agency Agreement.

Application Process

To become a Partner Agency of UWSC, an organization shall apply for partnership status by completing the current Partner Agency application; be approved by the UWSC Board of Directors; and agree to the terms and conditions of the UWSC's annual Partner Agency Agreement. If approved, the organization must annually sign the Partner Agency Agreement and adhere to applicable UWSC policies and, if funded through the ASSET process, adhere to ASSET policies and procedures.

Criteria

A Partner Agency shall have a clearly stated and legitimate purpose focused on meeting a recognized health or human service need in Story County and provide services to anyone in Story County who meets the organization's client eligibility requirements. The organization shall be incorporated as a non-profit health or human service provider. The organization shall be tax exempt under section 501 (c) (3) of the Internal Revenue Code and under Chapter 504A of the Code of Iowa. All necessary licenses, permits, certification and/or accreditation to provide services shall be current and valid. Organizations affiliated with parent organizations shall have written agreements which specify the relationship between the local and parent organizations, including the mutual responsibilities and accountabilities. The agency must have been incorporated and actively conducting business for at least one year at the time of the application.

If the organization provides programs that include inherently religious activities such as worship, prayer, proselytizing or instruction, a description of how these activities are separated from the UWSC-funded programs by time, location or both must be included.

The organization shall have written by-laws which clearly define the organization's purposes and functions; its structure; and the duties, authority, and responsibilities of the governing board and officers. Governance of the organization shall be vested in a responsible and active board of directors, comprised entirely of volunteers, all of whom serve without compensation. The board shall be broadly representative of the community and of the people the organization is designed to serve. At a minimum the board shall meet

quarterly. The by-laws shall provide for the orderly election of officers, and the terms, tenure, and the filling of vacancies of the board.

UWSC partner agency programs and other programs funded by UWSC shall not exclude any person who seeks services from receiving any service based on his or her race, color, creed, national origin, age, disability, gender, religion, sex (including pregnancy), gender identity, and sexual orientation, or any other factor protected by any applicable laws.

UWSC requires all partner agencies to follow Federal, state, and local nondiscrimination laws and encourages diversity in the selection of staff, Board members and other volunteers.

The organization shall operate in a defined and clearly identifiable area of community need. The organization shall clearly specify its program goals and provide services that meet the community need. Periodically, the community need shall be re-assessed, and the organization's program goals shall be modified accordingly.

The organization's facilities shall be suited to meet the purposes of the organization. Sites where direct services to clients are provided shall be appropriately located for the geographic area served. The facilities shall be handicapped accessible and conform to the Americans with Disabilities Act or, if this is not possible, programs shall be taken directly to the clients they serve.

The organization shall operate under a balanced budget approved by the organization's Board of Directors and account for funds in accordance with generally accepted accounting principles. It shall comply with all applicable state and federal laws regarding financial operations and reporting. If the organization's annual budget is \$250,000 or more, it shall provide an annual comparative financial audit by an independent public accounting firm and submit the audit, along with a copy of the organization's IRS Form 990 to the UWSC President and CEO (P/CEO) within six months of the end of its fiscal year. If the organization's annual budget is less than \$250,000, it shall submit a copy of its IRS Form 990 and a balance sheet prepared externally and independently to the UWSC P/CEO within six months of the end of its fiscal year. If funding is provided through the Story County ASSET process the audit or balance sheet should be submitted to the ASSET Administrator.

Each partner agency shall annually complete the following: a UWSC Partner Agency checklist reaffirming its compliance with the UWSC partner agency eligibility criteria and an Anti-Terrorism form.

Agencies that offer the following services shall not be eligible as a UWSC Partner Agency:

1. Agencies that are primarily political in nature.
2. Agencies that provide services limited to the members of a particular religious group.
3. Agencies that exist solely for the presentation of cultural, artistic, or recreational programs.
4. Basic educational program services considered the mandated responsibility of the public education system.

Dissolution

An Agency's partnership may be dissolved by the UWSC Board of Directors at the Partner Agency's request to be removed as a Partner Agency or by action of the UWSC Board of Directors.

Approved 5/27/10; Reviewed 7/29/21