



United Way
of the Midlands

ELIGIBILITY

UNITED WAY PARTNERSHIP STANDARDS

The table below represents the standards for partnership. The table presents the issue or domain of interest, the standard, and requirements that represent meeting the identified standards.

DOMAIN OF INTEREST	STANDARDS	REQUIREMENTS
Legal and Regulatory Requirements	<p>Organization meets legal and regulatory standards</p> <p>The organization is inclusive and non-discriminatory in its policies and practices</p>	<p>1a) IRS exemption letter 1b) Secretary of State Letter (annual registration to raise funds in SC) or exemption 1c) By-laws 1d) IRS Tax form 990 OR evidence the organization is exempt from completing a 990 (if exempt - a PRO FORMA 990) 1e) Document retention policy 1f) Whistle Blower Policy</p> <p>2a) The organization attests that it meets applicable all laws and regulations 2b) The organization describes it inclusion its practices/policies</p>
Social Capital and Financial Solvency	<p>The organization and subsidiary or affiliates are free from lawsuits or other legal/regulatory actions that would compromise the integrity of the organization</p> <p>It is not in the community's or UWM's best interest to partner with organizations that have pending legal issues that: threaten the financial solvency of the organization and/or threaten to impact negatively the reputation of the organization</p>	<p>3) The organization cannot have any lawsuits or other legal actions that would compromise the integrity of the organization</p>

Inclusion/Exclusion Criteria

UWM may partner with 501(C)(3) health and human service nonprofit organizations that have been in existence for at least one year:

- a. The organization must demonstrate that its program(s) support UWM's Community Impact outcomes/interests
- b. The organization must demonstrate that its program(s) can measure performance according to set indicators required by UWM

UWM does NOT partner with the following types of organizations:

- a. Organizations that exclusively serve their own members
- b. Organizations whose primary missions are promoting arts, the environment or animal rights or care
- c. Organizations whose primary work is advocacy and not direct services
- d. Organizations whose primary purpose is to raise money or fund programs that are not directly managed by the organization
- e. Schools that operate as nonprofit organizations

Contact Us

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United Way of the Midlands fights for the health, education and economic mobility of every person in our community.

UWM = United Way of the Midlands

Governance and Management/Operations	The organization operates effectively	<p>4a) Board meeting minutes 4b) Board list 4c) Email address 4d) Min. 5 member board 4e) Conflict of Interest policy 4f) Nepotism policy 4g) (A paid) executive does not have a vote on the board 4h) The organization periodically reviews the executive</p>
	The organization has financial integrity	<p>5a) Board approved budget (minutes) 5b) Periodic review of organization's financial records by board (minutes) 5c) Signature authority for checks (policy) 5d) General liability insurance 5e) Directors and Officers insurance</p> <p>Note: If partners do not have insurance(s) at the time of application, they must obtain insurances before partnership is renewed</p> <p>5d) Organizations with revenue >\$500,000 must have an audit</p> <p>Note: UWM may require organizations requesting grants to complete audits or have insurance as part of the grant application process.</p>
Program Effectiveness	<p>Programs are mission-centric</p> <p>Programs are results driven</p>	<p>6a) Programs and services align with mission and vision 6b) Provide services to individuals, groups or families in Calhoun, Fairfield, Lexington, Newberry, Orangeburg and/or Richland Counties</p> <p>7) Results are measurable</p>

Partnership Roles and Responsibilities Inclusion/Exclusion Criteria

1. Enter a formal Partnership Agreement with UWM that outlines the responsibilities of both the partner and UWM.
2. Identify itself as a Community Impact Partner at service locations.
3. Maintain partnership status:

a) If the partner cannot or does not meet certain standard(s), then it must provide an explanation for not meeting the standard(s) and a plan to bring the organization into compliance.

b) Failure to comply with UWM partnership standards may place the partner on conditional status or result in termination of the partnership

c) If the partner violates the fundraising policies (see Item 7), then the partner may lose its partnership status and its eligibility to receive funding.
i) If UWM terminates the partnership, the organization may re- apply for partnership after one year.

4. Inform UWM of circumstances which may affect partnership or the partner's operations, including but not limited to executive changes, the partner's financial solvency or changes in the partner's IRS status.

a) If the partner does not or cannot deliver direct services to its clients for a period of six months then partnership is automatically suspended. The partner may re-apply when services are restored.

5. Provide and update organizational information annually or more frequently if requested. Annual reporting documentation may include but is not limited to:

a) IRS 990 (If the partner does not submit the 990 to the IRS or if the partner completes the 990 EZ or POSTCARD, then it must also submit a Pro Forma 990)
b) Board list

- c) Annual audit if required by standard
- d) Participate in a financial review process. The review will be based on amounts of directed gifts and grants awarded to the partner. If financial vulnerability is indicated through the financial review process or by the partner through its own review, the following steps may be taken
 - i. Convene a meeting of select UWM staff, the partner director, other key staff and the partner's executive committee or officers.
 - ii. Inform UWM of partner's plan to mitigate the situation and set follow-up meeting dates with UWM
 - iii. UWM may provide referrals or other supports as appropriate to assist the organization
 - iv. UWM may continue the investment or terminate the partnership based on the partner's progress

6. Participate in the following activities:

- a) Support UWM fundraising and marketing activities, and participate in related UWM public meetings and special events
- b) Cooperate and work with the United Way by promoting the annual United Way Campaign, and identifying co-branding, volunteer, collaboration and advocacy opportunities that may further the common objectives of the United Way and the partner
 - i) If the partner receives Community Impact funding from UWM, promote the partner's association with UWM in media and public relations material related to programs and projects supported by awards from UWM
- c) Use the Get Connected or other volunteer portal used by UWM to post volunteer opportunities
- d) Annually, make at least one volunteer opportunity available to a group coordinated by UWM

7. Abide by the following fundraising guidelines:

- a) The partner's staff and volunteers shall not solicit donor designations to the partner through the UWM campaign in verbal presentations, media coverage, advertising, print, mail or any other way at any time during the year (Solicitation of Charitable Funds Act, Section 35-56-120 (C)).
- b) The partner shall not organize or participate in payroll deduction campaigns from July 1 to December 31 with any business, employer or other organization where UWM has a similar payroll deduction campaign, excepting campaigns organized within the partner's own organization

8. Provide opportunities for staff and board to contribute to UWM.

