

United Way of Denton County
New Partner Agency Application
Board approved October 2017



Letter of Intent

Upon receiving a Letter of Intent from an interested 501(c) 3 Health and Human Service Organization (Applicant), United Way of Denton County (UWDC) staff will prepare a packet of information for the applicant and schedule an initial consultation with the potential applicant to discuss qualifications and alignment with UWDC's mission and assessment of community needs. Qualified applicants will be reviewed by a UWDC board appointed review committee.

Partner Agency Policies and Guidelines

Please read the Partner Agency policies and guidelines (shown below) fully before attempting to complete an application.

Partner Agency Membership Criteria:

The agency's services must be consistent with the mission of UWDC, which is to improve lives in Denton County and demonstrate an ability to address critical community needs.

Partner Agency Requirements:

Applicant will be required to provide evidence that the following requirements are in place within the organization. All requirements must be in place and operative before UWDC will consider an application.

1. The applicant must provide human services which improve lives in Denton County and are of a high priority to UWDC.
2. The applicant is incorporated as a private, not-for-profit corporation under state statutes and regulations.
3. The applicant has on file written determinations from the Internal Revenue Service and appropriate state authority certifying its 501(c) 3 exempt classification and exemption number.
4. The applicant must have been in operation with a physical presence in Denton County for at least two (2) years at the time of application, and be open to serve their clients a minimum of twenty (20) hours a week.
5. The applicant must have a written statement reflecting its mission and general goals in health and human services in Denton County.
6. The applicant must conduct its business and maintain financial records in compliance with the Financial Accounting Standards Board (FASB). The American Institute of Certified Public Accountants' (AICPA) Audit and Accounting Guide for Not for Profit Organizations combined with FASB Statements are the models.
7. The applicant must have filed its IRS Form 990 (previous two years), audits (past two years, with documentation of any identified problems and resolutions), IRS 941

(previous two years if applicable) and evidence of the applicant's financial stability for the past two years.

8. A quorum of the applicant's local board should meet at least quarterly throughout the year, with written minutes of each meeting, including board attendance.
9. Actions of the applicant's board for the past two (2) years must be recorded in official minutes signed by authorized officials of the applicant.
10. The applicant organization should have evidence of a written program with anticipated outcome measurements, and an evaluation process that measures outcomes and program effectiveness.
11. The applicant's governing board should have policies on composition and rotation of board membership. – list policies required
12. The applicant should have defined procedures that it follows for the preparation, adoption, and implementation of an annual operating budget.
13. The applicant should provide basic liability, property, and directors and officers insurance coverage.
14. The applicant should identify its grievance procedures for receiving suggestions and/or complaints about its services.

Agency Guidelines:

Agency Guidelines are strongly recommended. In reviewing an application for partner agency status, UWDC will look more favorably toward an applicant that demonstrates the following:

1. The applicant's governing board should have at least 10 members. – language on composition of board, expertise, diversity, board reflects community they serve, participation level / the size of your board should give you the ability to...
2. The applicant should collaborate with other community agencies in meeting health and human service needs in the community.

Submission Instructions

Place one (1) copy of each of the following items in the following order (indexed and tabbed) in two (2) three-ring binders to make two (2) complete submissions. Submit both binders to the President/CEO or the Director of Community Impact of UWDC.

Checklist:

- Written abstract, not to exceed five (5) pages, describing the applicant agency and the services for which the agency will be seeking UWDC funding. Abstract should include:
 - Board approved mission statement
 - Applicants long-range plans (Organizational Strategic Goals for the next 3-5 years)

- The critical needs the program addresses (reference the most recent UWDC Community Needs Assessment where applicable)
 - Program goals/objectives, the measurements used, service counts, and outcomes achieved within the past 2 years (if available)
 - A description of the program's target population
 - Evidence of collaboration and cooperation with established agencies in the same or related fields
 - The UWDC Focus Area(s) in which funding will be sought and reason for applying
- State record of incorporation & Internal Revenue Service Determination Letter.
 - Proof of Denton County Occupancy (you may provide any of the following: Certificate of Occupancy, Insurance policies, lease agreement, utility statements or a notarized statement from host organization if the applicant is housed within another agency) and a listing of client services hours.
 - The applicant's last two (2) IRS Form 990s (if applicable).
 - The applicant's audits by an independent certified public accountant with management letters and accompanying notes for the past two (2) years. Include documentations of any corrections made.
 - Access to review agency's employee records.
 - The Board approved budget for the current and the past two (2) years.
 - Roster of governing board including names, addresses (home or work), length of term and board position.
 - Approved board minutes for at least the prior two (2) years signed by authorized officials of the applicant.
 - Written board approved personnel policies.
 - Governance Guidelines and/or Bylaws addressing the policies on composition and rotation of Board membership.
 - The procedure for preparation and adoption of the annual budget, including: the timeline; who is responsible at each level; in what format, and to whom the proposed budget will be submitted to for approval.
 - An insurance statement that shows basic liability, property, and Directors and Officers insurance policies are in effect, the amount of coverage for each, and with whom the policy is held.
 - Policies indicating ways in which suggestions and/or complaints are received, such as a complaints and/or issues form, satisfaction survey, phone calls, and/or in-person contact, and to whom each one is routed. The policies should indicate the timeframe in which an evaluation, decision and response is made.
 - Descriptions of collaborative grants/funding and/or program operations.

Application Review

Once application is received by UWDC, the applicant will be contacted to schedule a time for the Community Investment Committee to make a site visit and attend the applicant's next board meeting. Once the evaluation of the application is completed, you will be notified by letter if accepted or rejected. If accepted as a new partner agency, applicant will be required to sign a Memorandum of Agreement and meet with UWDC staff for new partner agency orientation.

New partner agencies may participate in all activities afforded current partners, but are not guaranteed funding from the UWDC Community Fund after acceptance.

Questions may be directed to the Director of Community Impact or the President/CEO of United Way of Denton County:

Leah Jordan
Director of Community Impact
leah@unitedwaydenton.org
(940) 566-5851 x 105

Gary Henderson
President/CEO
Gary@unitedwaydenton.org
(940) 566-5851 x104