BECOME A QUALIFIED PARTNER OF UNITED WAY OF THE GREATER LEHIGH VALLEY

United Way of the Greater Lehigh Valley (UWGLV) prioritizes granting to nonprofit organizations serving the Lehigh Valley community. Where necessary, UWGLV reserves the right to fund other types of organizations, including, but not limited to, public non-profits, for-profits, and school districts.

Core Criteria/Requirements/Benefits.
Does the organization meet the following core criteria?

- Must have 501c(3) status for a minimum of one year or attachment to a fiscal sponsor with active 501c(3) status. Pennsylvania Department of Education licenses/registered school districts or for-profit organizations are also eligible.
- Provides health and human services programming in the areas of education, healthy aging, food access, and/or emergency services within UWGLV areas.
- Does not discriminate against (hiring process and recipients of services) on the basis of race, color, national origin, religion, sex, gender identity, disability, medical condition, ancestry, marital status, sexual orientation, citizenship, age, or service in the uniformed services. Specific exclusions necessary to the essential operation of a program(s) will be reviewed on a case-by-case basis. (Example: women's shelter)

Requirements of being a UWGLV Partner

- Meet initial qualification criteria in United Way Qualified Community Partner Application
- Meet qualification renewal criteria: Annual (funded) or Biannual (non-funded)
- Run a United Way Campaign (annual)
- Observe brand mark usage guidelines when using the United Way logo

Benefits of being a UWGLV Partner

- Eligible to apply for grants
- Employees can designate to approved health and human services 501(c)(3)'s with no administrative fee*
- Invitations to forums
- Placed on Member Agency Designation List for website donor portals*
- Access to submit organization events to UWGLV website
- Eligible for organizational capacity building and support*
  *Non-profits Only

UWGLV Qualified Community Partner Application

UWGLV accepts Partner applications on a rolling basis and organizations will be notified within 90 days of receipt.
Please contact us if there are any questions regarding how the organization can meet the outlined criteria. A resource guide to aid in meeting criteria is available on the UWGLV website.

Applications can be accessed via e-CImpact, UWGLV's grants management platform.

For questions about the application, please contact Priscilla Rosado at 610.807.5731 or priscillar@unitedwayglv.org. Please note: The United Way Partner Qualified Community Partner Application is a necessary condition for funding but does not guarantee that the organization will receive funding in the future.

Organization Name:
_____

Organization Address:
_____

Federal EIN: _____

Website:
_____

Executive Director:
_____

Phone: _____

E-Mail: _____

Board President/Chair: _____

Phone: _____

E-Mail: _____

Mission Statement:
_____

Are you submitting this application as a Fiscal Sponsor* on behalf of an organization, group or individual that is conducting a project or charitable effort and does not have their own 501c3?
YES   No
☐   ☐

If yes, indicate the name of the organization, group, or individual that is being sponsored
_____

*The IRS guidelines require that the receiving entity, (the sponsor):
- Must be a 501c3 public charity
- The receiving entity must retain discretion and control of the funds
- The activities must be charitable in nature
- The sponsor must maintain records that substantiate the use of funds for appropriate 501c3 purposes.

INSTRUCTIONS
 Prior to sending in the completed application:
1. Review the application;
2. Sign the Signature and Approval section below attesting that the information provided is true and correct, and that it has been duly authorized and approved by the Board of Directors;
3. Submit all requested materials with this application.

SIGNATURES AND APPROVAL SECTION
As the Chief Volunteer, Professional and Financial Officers, we hereby certify and attest to the validity of the Qualifications Criteria for United Way Partner consideration. In addition, we affirm that the Board of Directors reviewed and approved this document on_____.

_____
Signed Name Date Executive Director/Chief Professional Officer

_____
Printed Name Date Executive Director/Chief

_____
Signed Name Date Chief Financial Officer Professional Officer

_____
Printed Name Date Chief Financial Officer

_____
Signed Name Date Board President/Chief Volunteer Officer

_____
Printed Name Date Board President/Chief

United Way of the Greater Lehigh Valley

CRITERION #1 Provides health and human services programming in at least one of the following areas: Education, Healthy Aging, Food Access, and/or Emergency Services:

YES   No

☐   ☐   Education
☐   ☐   Healthy Aging
☐   ☐   Community Stability (food & housing)

_____

CRITERION #2 Provides health and human services programming in at least one of the following locations:

YES   No

☐   ☐   Carbon County
☐   ☐   Lehigh County
☐   ☐   Northampton County

Please list any additional counties served:

_____

CRITERION #3 - Tax Status

Please attach a copy of the organization's IRS 501c(3) Letter of Tax Exemption

YES   NO

☐   ☐   Organization has at least 1 year of IRS 501c(3) status
☐   ☐   Attached to a fiscal sponsor for at least 1 year

_____

CRITERION #4 Nondiscrimination

Please attach an organizational document that states the anti-discrimination policy

The organization does not discriminate against (hiring process and recipients of services) on the basis of race, color, national origin, religion, sex, gender identity, disability, medical condition, ancestry, marital status, sexual orientation, citizenship, age, or service in the uniformed

services. Specific exclusions necessary to the essential operation of a program(s) will be reviewed on a case-by-case basis. (Example: women's shelter)

YES ☐ NO ☐

If 'NO', please attach a description of specific exclusions and why they are necessary to the essential operation of a program(s)

_____

CRITERION #5–Articles of Incorporation

Please attach a copy of the organization's Articles of Incorporation.

_____

CRITERION #6 Bylaws

Please attach a copy of the organization's bylaws.

Required practices:

YES	NO	
☐	☐	States that at least four (4) board meetings with quorum held each year
☐	☐	Board is comprised of a majority of independent and unrelated directors

Encouraged practices:

YES	NO	
☐		☐Criteria for membership and term lengths
☐		☐Provisions for the size and election of the Board of Directors Description for established officers
☐		☐Board is responsible for policy development
☐		☐Board is responsible for resource development/financial viability
☐		☐Board is responsible for evaluation of the organization's activities
☐		☐Board is responsible for supervising the chief professional officer
☐		☐Board is only made of volunteers

_____

CRITERION #7 Board Roster:
Please attach a current Board of Directors roster with the following information.
- Names
- Designation of officers (President, Vice President, Treasurer, Secretary)
- Beginning and ending term dates

CRITERION #8 Pennsylvania Bureau of Charitable Organizations certificate ==**Non-profits Only**==

Please attach proof of annual certificate of registration with the State of Pennsylvania Bureau of Charitable Organizations.
    OR
Attach documentation that the organization is excluded or exempt from the Pennsylvania Solicitation of Funds for Charitable Purposes Act

Reason excluded or exempted:
_____

CRITERION #9 Policies and Procedures (Code of Conduct policy):

UWGLV requires the following:

YES NO

☐   ☐ Policies and procedures are reviewed and revised at least once every 2 years

☐   ☐ Governing conflicts of interest and self-dealing transactions

☐   ☐ Document retention and destruction policy

_____

CRITERION #10 Whistleblower Policy

☐ Please attach the organization's whistleblower policy

_____

CRITERION#11 Measuring Organizational Impact

Please explain how your organization measures impact and progress toward achieving your mission.

_____
_____
_____
_____

United Way of the Greater Lehigh Valley

CRITERION #12 Current/Pending Litigation

Does the agency have any current or pending litigation against the Board of Directors, Organization Executive (s) and/or the organization that was not captured in the financial audit?

YES NO

☐   ☐ If yes, please attach an explanation.

_____

CRITERION #13 Insurance

Please attach the organization's certificate of liability insurance

_____

CRITERION #14 Financial Statements

UWGLV requires all partners to submit the following financial information to become a qualified partner. If your organization does not meet the budgetary threshold to have a formal financial audit, you must have a financial review by a CPA firm. Organizations funded by UWGLV can use up to 5% of their award amount for an audit or review by an auditor or CPA.

Organization Size (annual budget)				
Grant Award	Up to $100,000	$100,000-$349,999	$350,000-$749,999	$750,000+
$5000 or Less	Review*	Review *	Review	Audit
$5,001- $10,000	Review*	Review*	Review	Audit
$10,001-$25,000	Review*	Review*	Audit	Audit
$25,000 +	N/A	Review*	Audit	Audit

* First time applicants who do not have a financial review performed by an auditor or CPA may submit their most recent board-approved and signed year-end financials in lieu of an auditor/CPA Review.

Financial Review prepared by an independent, licensed certified public accountant, covering the fiscal year ending not more than 18 months prior to application submission. The review must be prepared in accordance with generally accepted accounting principles.

Financial Audit prepared by an independent certified public accountant, covering the fiscal year ending not more than 18 months prior to application submission. The audit must be prepared in accordance with generally accepted auditing standards and generally accepted accounting principles, to include an opinion regarding the presentation of the organization's financial statement.

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Greater Lehigh Valley

☐ Attached current year organizational budget

☐ Attached last year's financial audit

☐ Attached last year's financial review by a CPA organization

☐ Attached most recent board-approved and signed year-end financials

_____

CRITERION #15–IRS Form 990 or Form 1120: The organization files an annual Form 990 or Form 1120, if required by the IRS. The IRS form should match the year of the audit, review, or board-approved financial statements provided above.

☐ Please attach most recent 990 or 1120 form

_____

CRITERION #16 DIVERSITY EQUITY AND INCLUSION

UWGLV understands diverse, inclusive, and equitable organizations and practices are essential as part of a dynamic and changing world. Diversity is a strength, equity is needed when doing work in the community, and all people should be able to access needed services.

As we continue our work, we ask that our partners share where they are in the journey and their plans for the future. How does your organization center equity in practice?
_____
_____
_____
_____

CRITERION #17 Accessibility of services

The organization's facility where customers receive services or inquire about services has accessible parking, entrance and path of travel, and restrooms.

Check all that apply:

☐ Accessible parking for people with disabilities to get into or out of a vehicle, and around the vehicle
☐ A route of entrance and travel that does not require the use of stairs, is at least 36 inches wide, and curbs on the route have curb cuts at drives, parking, and drop-offs.
☐ Restrooms that meet the Americans with Disabilities Act accessibility guidelines, including specifications for wheelchair access, sinks and counters, and stalls and urinals.

Additional information or details regarding an Accessible Environment [list or attach]:

_____

CRITERION #18- Access to Services: Language and Materials

Non-English speaking, and deaf and hard of hearing customers can receive services or inquire about services through language interpreters or multilingual staff, and organization or program materials are available in alternate formats.

Check all that apply:

☐ Multilingual staff
☐ Language interpreters
☐ Materials that are available in multiple languages.
☐ Materials that are available in alternate formats. Examples: braille, captioned multimedia, audio description, electronic format, large print

Additional information or details regarding Language and Materials [list or attach]:

_____

CRITERION #19- Trauma Informed Practices

Has your staff been trained in trauma informed practices? (if not, are you interested?)

YES or NO
☐   ☐

Has your staff been trained in cultural humility and culturally responsive practices? (if not are you interested?)

YES or NO
☐   ☐