

# United Way Community Funding Information for Registered Charities

## 2010 Eligibility Criteria

Agencies/organizations must meet the following criteria:

1. Legal Requirements
  - A. Be incorporated as a non profit organization.
  - B. Be registered as a charity under the Canada Income Tax Act.
  - C. Be located within the boundaries of the United Way of Lethbridge & South Western Alberta and provide services to clients within this area.
2. Board Requirements
  - A. The agency is governed by a volunteer Board of Directors that receive no financial remuneration.
  - B. The agency Board meets at least 8 times per year and operates with a quorum.
  - C. The agency Board make-up is representative of the area programs are offered to clients.
  - D. The duties and responsibilities of the Board are defined in writing.
3. Fiscal/Administration Requirements
  - A. The agency has an annual independent audit with full reporting of all agency and program expenses and revenues.
  - B. Program expenses and revenues must be clearly separated from the overall agency expense and revenue budget.
  - C. Demonstrate approved financial need while at the same time show a balanced approach to annual budgeting.
4. Personnel Administration Requirements
  - A. The agency has written personnel policies, guidelines and job descriptions for program staff and volunteers.

## **FUNDING GUIDELINES**

### **Funding Information**

The United Way will fund specific **programs or services** that meet the intent of our mission. The United Way is accountable to its donors and the community at large. The expectation is that each agency applying for funding demonstrates:

- |   |                               |
|---|-------------------------------|
| <input type="checkbox"/> Need in the community                | <u>Funding Priority Areas</u> |
| <input type="checkbox"/> Efficiency in management             | *Disadvantaged Children &     |
| <input type="checkbox"/> Accountability                       | *Domestic Violence            |
| <input type="checkbox"/> Effectiveness                        | *Senior & Persons with        |
| <input type="checkbox"/> Accessibility                        | Developmental Disabilities    |
| <input type="checkbox"/> Need for United Way funding families | *Economically challenged      |
| <input type="checkbox"/> Support of the United Way            |                               |

### **United Way will NOT fund:**

- Agencies/organizations acting in the capacity of a funding body.
- Agencies/organizations that duplicate services in the same geographical area.
- Agencies/organizations affiliated with a political party or have a political mandate.
- Agencies/organizations without registered charitable status.
- Churches
- Individuals
- Capital Projects, renovations, and purchase of property.
- Annual fundraising drive or events.

### **Supplementary Fundraising Policy**

Funded Member Agencies must not conduct or promote supplementary fundraising activities during the United Way campaign period September 7 to December 15. *See Appendix A.* The only exceptions to this policy are events/activities that have been established from the organizations head office and have been ongoing. Newly developed fundraising activities must not occur. Contact United Way for additional information.