

# AGENCY ADMISSION POLICY



United Way of  
Washington County

## THE UNITED WAY OF WASHINGTON COUNTY

is a volunteer-driven organization serving 10 communities in Washington County. It is governed by a board of community volunteers, dedicated to providing funding and community resources for health and human service needs.

### OUR MISSION:

To measurably improve the quality of life of Washington County residents by identifying and responding to human service needs.

We accomplish our mission by:

Help identify and create awareness of human service needs.

Raise and distribute funds to prioritized human service programs based on identified impact areas and program outcomes.

Collaborate with our agencies and other community partners.

Demonstrate accountability to donors, agencies, program beneficiaries and the local community.

Recruit and maintain a diverse, vibrant, working board comprised of community volunteers.

*Core Values:* Leadership, Accountability, Responsiveness, Collaboration, Diversity

### ELIGIBILITY REQUIREMENTS:

- Incorporated as a 501(c)(3), 509(a)(1) or 509(a)(3) Agency in the state of Wisconsin.
- Provide a health and/or human service for Washington County residents.
- The objectives and program of an applicant Agency must be consistent with the above-stated United Way mission and considered appropriate for voluntary philanthropic support.
- The Applicant Agency, for at least one year and as presently operating, is effective in meeting its stated objectives, and a review of its services confirms that its standards of performance and quality are acceptable. The United Way Board reserves the right to waive the one-year requirement.
- The services offered by the Agency must not duplicate services provided by an existing organization, or could not be provided in an economical way by an existing Agency. The need met by the applicant Agency must be great enough to justify the support of an additional Agency within the United Way as determined by the CIC and approved by the Board.
- The Agency gives satisfactory evidence of its willingness to cooperate fully with other United Way agencies, and that it will operate within the framework of the current United Way policies by the time of admission into the United Way.

## **AGENCY ADMISSION POLICY, cont.**

---

- The Agency has a volunteer Board of Directors, which meets face-to-face at least quarterly. No more than one paid staff person can be on the Board, who cannot chair the Board or serve as treasurer.
- Agency Board is active and responsible, approves all policy decisions and conforms to accepted standards of composition, size and rotation of members and officers.
- Professional independent audit or financial review, line-item operating budget, and a double-entry accounting system.
- Agency agrees to abide by United Way's fund raising policy as stated in its *Member Agency Fundraising Policy* (available at [www.unitedwayofwashingtoncounty.org](http://www.unitedwayofwashingtoncounty.org)).

Other materials and information as requested.

### **PROCESS FOR ADMITTING NEW AGENCIES:**

1. All new admissions start through the Venture Grant Process.
2. Venture Grant data must demonstrate program's success.
3. A Venture Grant award does not automatically confirm Member Agency Admission. An agency may become a United Way Member Agency after receiving two consecutive Venture Grant program awards.
4. After an agency has been invited to submit a 2<sup>nd</sup> year Venture Grant application (during the fall of the 1<sup>st</sup> Venture Grant award year), it is eligible to submit a written request to become a United Way member agency. An agency not invited to complete a 2<sup>nd</sup> year Venture Grant application is ineligible to apply to become a United Way member agency.
5. The Community Impact Committee reviews all requests for admission as a United Way Member Agency. Additional information may be asked of the agency.
6. The applicant is required to make a presentation to the Community Impact Committee for admission (see *New Agency Timeline* on page 3)
7. The Community Impact Committee will present recommendations for Agency membership to the Executive Committee. The Executive Committee discusses the application and makes a preliminary recommendation.
8. If membership is recommended, the chair of the Community Impact Committee will present the committee's recommendation to the United Way Board of Directors. Board approves/disapproves membership. A two-thirds vote of the Board is needed to admit an Agency.
9. If the Community Impact, Executive Committee or Board determines that the Agency does not meet the requirements and objectives of United Way, the Agency will be notified in writing of the reasons for denial and that they will not be eligible to become a member agency at this time.
10. Agencies accepted for membership are eligible to participate in the annual spring fund distribution application process. Acceptance as a United Way member agency does not guarantee that a program will receive an annual program-funding award.
11. If an Agency does not receive any program funding for a calendar year, it will be considered inactive. If no program funding is awarded for two consecutive years, the Agency must reapply to become a United Way of Washington County member agency.

United Way of Washington County  
**NEW AGENCY ADMISSION TIMELINE**

**1 & 2 YEARS PRIOR TO AGENCY ADMISSION**

- Agency applies for and receives Venture Grant program funding

**DURING 1st YEAR VENTURE GRANT AWARD PERIOD**

- Agency submits a proposal for a 2<sup>nd</sup> year Venture Grant and is invited to complete a 2<sup>nd</sup> year Venture Grant application. An agency not invited to complete a 2<sup>nd</sup> year Venture Grant application is ineligible to apply to become a United Way member agency.
- Agency representative(s) and Community Impact Coordinator discuss interest in, requirements and process for becoming a member agency.
- By September of the first Venture Grant award year, an agency wanting to become a United Way member agency must notify United Way in writing of its intent to apply to become a member agency

**SEPTEMBER, 1<sup>st</sup> YEAR VENTURE GRANT AWARD PERIOD**

- Fund distribution panel reviews 2<sup>nd</sup> year Venture Grant application and informs the Community Impact Committee whether they feel the agency would be a good addition as a United Way Member Agency

**OCTOBER, 1<sup>st</sup> YEAR VENTURE GRANT AWARD PERIOD**

- Agencies applying to become a member agency make a presentation to CIC
  - If CIC determines that the agency does not meet the United Way's requirements and objectives, the agency is notified in writing of this fact and that they are not eligible to become a member agency nor may they apply for member agency annual program funding
  - If CIC recommends admission, request for admission is forwarded to Executive Committee to determine if agency meets United Way objectives
- If the Executive Committee recommends admission, request is presented to the United Way Board in October for approval / disapproval as a member agency
- If Executive Committee determines that the agency does not meet the United Way objectives, the agency is notified in writing of this fact

**NOVEMBER, 1<sup>st</sup> YEAR VENTURE GRANT AWARD PERIOD**

- Agency is notified of acceptance as a United Way member agency and invited to attend December member agency meeting to receive instructions for and forms to request program funding during upcoming member agency spring annual funding cycle
- Agency acceptance as a member agency is announced in a press release

**MARCH, 2<sup>nd</sup> YEAR VENTURE GRANT AWARD PERIOD**

- Agency submits program funding request application as part of the member agency annual program funding process