

The United Way of York County Eligibility Review Process



Undergoing an organizational eligibility review is the first step for a non-profit health & human service organization interested in seeking financial support from United Way of York County (UWYC) for its programs.

Eligibility Review is an organization-focused process developed by UWYC to ensure that organizations receiving program funding 1) are accountable to our donors and the broader community, and 2) employ sound non-profit management practices to our donors and the community at large.

To begin the review process, an interested organization should contact UWYC's Director of Strategic Impact to establish a deadline for submission of materials. The organization will be required to submit documentation including:

- IRS letter of determination
- Board of Directors roster with terms, meeting dates and locations
- Financial documents including the most recent IRS Form 990 and audit (if the organization's budget is greater than \$100,000) and current financial statements
- Listing of current programs and services
- Checklist of current status of the organization

These materials are reviewed by UWYC's Eligibility Review Team, a subcommittee of the Finance Committee. This group is composed of community volunteers skilled in key financial and management areas who are able to conduct an objective screening of the organization and its practices. The Eligibility Review Team meets three times per year to review submitted materials and determine the duration of an organization's eligibility status, ranging from zero to three years.

Organizations may choose to participate in the process simply for the usefulness of this review to their operations. It is not necessary to seek funding from UWYC, nor does the eligibility process guarantee future funding in any way. However, should an organization wish to be considered for UWYC program support, the eligibility review process must be completed first. If determined to be eligible, an organization may submit one or more proposals via a request for proposal process held each year that focuses on UWYC's strategic priorities and desired community outcomes.

Organizations wishing to complete an eligibility review may contact Lora Kline, UWYC's Director of Strategic Impact at lkline@buildcommunity.org or 985-3359 to schedule a review. More information about UWYC and its priorities is available at www.buildcommunity.org.

Benefits for UWYC Eligible Organizations:

- Provides recognition that an organization cares about public accountability and is soundly managed according to accepted non-profit management principles.
- Allows community organizations to respond to UWYC's proposal process each year and to submit programs for UWYC funding consideration.
- Connects community organizations to the federated campaigns in which UWYC currently participates. These include the Combined Federal Campaign (for federal employees), the Maine State Employees Combined Charitable Appeal (for Maine state government employees), and the Combined Charitable Appeal of University Employees (University of Maine System).
- Eligible organizations may identify themselves as a United Way of York County eligible organization when seeking other grants and support. Eligibility does not, however, permit use of the UWYC logo.