

## **United Appeal for Athens County Partner Agency Criteria**

### **I. INTRODUCTION**

United Appeal selects partner agencies for fundraising partnership from among those that provide health and human services in Athens County and meet other criteria as outlined below. In addition, United Appeal 2-1-1 Information and Referral service makes every effort to list all qualified service providers in its 2-1-1 database, including many of those that are not United Appeal partner agencies.

An agency considering application for partnership with United Appeal should consider both the benefits and expectations available through that partnership. Partnerships result in raising funds and awareness for both United Appeal and the partner agencies. Partner agencies receive annual allocations from funds raised through United Appeal's fundraising efforts which include relationships with major employers both on local and regional levels. In return, partner agencies participate in fundraising and awareness raising events and activities with United Appeal. To maintain transparency and accuracy, partner agencies also share their financial information with United Appeal and make annual reports as to how United Appeal funds were spent.

### **II. APPLICATION PROCESS**

By June of each year, the board will determine partner agencies for the subsequent October-February fundraising campaign. In April of each year, agencies will be notified about the timeline and requirements.

### **III. ELIGIBILITY CRITERIA**

Partner agencies are required to meet these criteria:

- 1. Agency Constitution & By-laws** must clearly define the agency's purpose and objectives and outline the duties, authority and responsibilities of its governing board.
- 2. Charter of Incorporation and Tax Exempt Status** Agency must be incorporated and not-for-profit, exempt from federal income tax under Section 501 (c) (3) of the Internal Revenue Code. Agency must file annual IRS 990 forms (not 990 EZ) and pay fees with Ohio Attorney General and comply with all other legal reporting requirements.
- 3. Non-Discrimination Policy & Affirmative Action Statement** are required; agency must be in compliance with all federal, state and local laws.
- 4. Necessary Program Licenses** must be up to date for services being provided by agency.
- 5. Financial Review** Agency must undergo an annual external financial audit.
- 6. Agency Service Area** shall include all of Athens County.
- 7. Board organization** Agency shall be governed by a board that meets on a regular basis and oversees the development and implementation of agency's annual operating budget. Board should maintain a conflict of interest policy for board and staff members.
- 8. Purpose** of the agency must be to serve the needs of health and/or human services.
- 9. Personnel Policies** must be in written form for all agency paid staff.

**All partner agencies are expected to promote United Appeal in all their publications, both printed and electronic. Agencies are required to assist in raising funds for United Appeal for the mutual benefit of all partner agencies and United Appeal programs. Upon acceptance, agencies will sign an agreement with United Appeal which spells out the mutual expectations.**