United Way of Boone County, Illinois

Membership Eligibility Criteria Certification

In order to be considered for nonprofit membership with United Way of Boone County Illinois for FY2022 funding period, an organization must meet all eligibility requirements as described below. A nonprofit organization’s affiliation or partnership with United Way of Boone County, Illinois is at the sole discretion of United Way of Boone County, Illinois, and we reserve the right to exclude from partnership any organization that fails to demonstrate and maintain sound organizational management practices, adequate capacity to deliver programs and services, or appropriate stewardship of resources.

1. Have substantial local presence and/or programming in the geographic area covered by the United Way of Boone County campaign, which includes Belvidere, Caledonia, Capron, Garden Prairie and Poplar Grove in Boone County.
2. Be an incorporated not-for-profit and have a registered constitution and/or bylaws. The organization must have been incorporated for a minimum of three years prior to January 1st of the application year (i.e., incorporation date prior to January 1, 2021).
3. Be recognized by the Internal Revenue Service (IRS) as tax-exempt under 501(c) 3 of the Internal Revenue Code and have been notified by the IRS that the organization is not a private foundation as defined in Section 509 (a) of the Internal Revenue Code.
4. Be able to demonstrate and document community programming and activities for the prior calendar year (January 1 – December 31).
5. Have an active and responsible governing Board of three (3) or more volunteers whose members have no material conflict of interest.
6. If the nonprofit's annual revenue is $300,000 or greater, provide audited financial statements for the organization covering the fiscal year ending not more than 18 months prior to January 2021 (i.e. ending on or after June 30, 2019). *The audit must express an unqualified opinion and must be conducted by an independent Certified Public Accountant in accordance with Generally Accepted Auditing Standards (GAAS). Cash basis, cash modified, or modified accrual basis accounting systems are unacceptable. Reviews and/or compiled audits are unacceptable. Combined consolidated financial statements are not accepted unless the applicant's financial information is reflected in a separate audited combining or consolidating schedule.*
7. Provide a copy of the most recently completed IRS Form 990 covering the fiscal year ending not more than 18 months prior to January 2021 (i.e., ending on or after June 30, 2019). Typically, larger nonprofits with gross receipts of more than $50,000 file Form 990 or 990-EZ. Smaller nonprofits with gross receipts of less than $50,000 file Form 990-N (e-Postcard).
8. Maintain an administrative and fundraising rate (AFR) of less than 35% of total revenue. *It is calculated as a percentage of the organization’s total support and revenue as reported on the IRS Form 990. This percentage is computed by adding the amount in Part IX (Statement of Functional Expenses), Line 25, Column C (Management and General Expenses) to the amount in Line 25, Column D (Fundraising Expenses), and dividing the total sum by Part VIII (Statement of Revenue), Line 12, Column A (Total Revenue). No other method may be used to calculate the overhead rate percentage. All percentages must be listed to the tenth of a percent (e.g., 15.7%).*
9. Maintain expenses connected with lobbying activities and/or activities attempting to influence voting or legislation at the local, state or federal level within the limitations which allow them to be classified as a tax-exempt charity under 26 U.S.C. 501 (h).
10. Have an appropriate policy that demonstrates a practice of non-discrimination as it relates to the operation of the organization, including service delivery, on the basis of race, creed, color, religion, gender, age, national origin, physical or mental health, sexual orientation or any characteristic protected by law.
11. Affirm that the applicant organization prioritizes diversity and inclusion and that it will seek out, welcome and build upon the diversity and the positive attributes that exist within the communities served.  This includes ensuring that all services are accessible to all individuals, and that the organization demonstrates an understanding of, respect for, and responsiveness to the home culture and language of the individuals and families served.
12. Comply with applicable federal, state and municipal laws and regulations. This includes, but is not limited to, compliance with individual state registration requirements for charitable solicitation.
13. Certify compliance with provisions of the USA PATRIOT Act and anti-terrorism measures.
14. United Way of Boone County, Illinois nonprofit organizations are encouraged to conduct an in-house United Way campaign among staff, board members or other stakeholders.
15. Actively participate in events and activities hosted by United Way of Boone County, Illinois.

Name of Organization: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Executive Director or CEO Board President**

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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