

SAN JUAN UNITED WAY

CRITERIA FOR ADMISSION

The intent of SJUW's admissions policy is to allow the inclusion of agencies that address established community needs and provide significant services to the citizens of San Juan County. Emphasis will be placed on the quality of service provided by the agency and the continued need for its services.

GENERAL PROVISIONS

All agencies seeking Partner Agency status with San Juan United Way must:

1. Serve clients for human health, welfare and/or human development and be accessible to clients and potential clients throughout the entire county.
2. Not have as its primary function general education, politics, religion, propaganda issues, cultural issues, or any other issue identified by the San Juan United Way Board of Directors as controversial in nature. Agencies will be excluded from admission if their admission would jeopardize the fundraising capability of San Juan United Way for its partner agencies.
3. An agency operating under any of the auspices mentioned in General Provisions 2, shall clearly distinguish between the services it provides of a health and welfare and/or human development nature from those listed as ineligible in budget and in program. It is not San Juan United Way's intent to fund any agency that imposes its organizational philosophies or mandates participation in any programs related to these ineligible activities.
4. Be organized as a non-profit corporation as evidenced by having 501 (c) (3) Documentation (or equivalent Determination of Tax Exemption)
5. Demonstrate a reasonable degree of continuity, and permanence, exhibited by no less than one year's existence within the community. It also must provide evidence of a broad range of sources of voluntary financial contributions, a sizable and active volunteer membership that is representative of the area it serves and a positive public image.
6. Maintain active, non-discriminatory programs serving established needs within our county.
7. Exhibit evidence of efficiency of the operation.
8. Exhibit a cooperative working relationship in community planning with San Juan United Way and other community agencies to strengthen present or proposed services, and ensure that services are not being unnecessarily duplicated.
9. Be an Equal Opportunity Employer.

10. Complete and submit San Juan United Way's application for admission by April 1st.

MANAGEMENT PROVISIONS

1. The Agency's governance shall be vested in a soundly constituted governing body of reasonable size with broad community representation, provisions for rotation of its members, and appropriate administrative control. The governing body shall serve without compensation, hold regular meetings and be sufficiently regular in its membership attendance to indicate genuine interest, participation and control of the organization.
2. The agency shall be managed under policies assuring effective, economical and efficient operation. It shall have written policies and procedures governing such things at a minimum as personnel and client grievance policies and procedures. It shall also utilize a standard system of accounting, and have its accounts audited annually by a certified public accountant in conformance with accepted accounting practices established by the American Institute of Certified Public Accountants.
3. The agency shall have qualified staff and must make effective use of volunteers.
4. The agency's physical facilities shall be adequate to serve the purpose for which it is in operation.
5. The agency's office hours, or hours of operation should be such as to meet the needs of the population served by the agency.
6. The agency shall maintain complete service records and reports for at least a three year period which will be made available to San Juan United Way representatives upon request
7. The agency must sign a Partner Agency Agreement form which, among other things, shall include, but not be limited to, the following procedures:
 - a. Submit annually audited financial statements for the previous fiscal year. These financial statements are subject to review at any time by a representative of the Allocations and Admissions Committee of San Juan United Way.
 - b. Submit an organizational strategic plan covering a minimum of three years and the year during which the strategic plan will be reviewed and updated.
 - c. The agency agrees to provide written notification to San Juan United Way prior to undertaking a capital campaign.
 - d. The agency may not incur debt of any kind for which San Juan United Way, directly or indirectly, may be asked to fund without prior written approval.

UNITED WAY ADMISSION POLICIES

1. ALLOCATION and ADMISSION COMMITTEE

Members of the San Juan United Way Allocation and Admission Committee will review the application for admission submitted by the applying agency and make subsequent recommendation to the San Juan United Way Board of Directors. During its deliberations the Allocation and Admission Committee will meet with representatives of the applying agency. The Admission's Committee will determine any meeting with appropriate notice given to the representatives of the applying agency.

2. AGENCY EVALUATION

An agency evaluation will take place upon the agency's initial application as a San Juan United Way Partner Agency, and once every three years after the agency's acceptance as a Partner Agency. Key board members and appropriate staff members should be prepared to make the applying agency's presentation. The participants will discuss with San Juan United Way the agency's structure, services, goals, needs and financial requirements, and the relationship and procedures between San Juan United Way and its Partner Agencies. While considerable discussion will concern the financial aspects of the Agency, the detailed budgeting and determination of an allocation to a specific program will be determined annually by the San Juan United Way Board of Directors during the campaign allocation process. San Juan United Way Allocation and Admissions Committee will review the agency's operations to ascertain:

- a. The need for the agency's services (i.e.: community priority).
- b. The relationship of agency with other existing agencies and programs.
- c. The current fiscal condition of the agency and its future financial outlook.
- d. The ability for the agency to meet the needs of its entire constituency.
- e. Whether an on-site visit may also be necessary.

3. TIME PERIOD FOR ADMITTING NEW PARTNER AGENCIES

San Juan United Way will make final admissions decisions by the May Board of Directors' meeting. To have final Board action on an agency's application by May 31st means that an agency should **submit a request for admission no later than April 1st.**

Upon approval by the Board of Directors of San Juan United Way as a Partner Agency the newly admitted agency may submit requests for potential funding during the normal San Juan United Way allocation

process. Please refer to the accompanying Application for Admission when preparing the agency Application.