

## **AGENCY APPLICATION PROCEDURES**

Any agency interested in becoming a member of the Oelwein Area United Way should submit the following documents to the Oelwein Area United Way Board of Directors:

1. Letter from the IRS stating the organization's 501 © (3) non-profit status
2. Articles of Incorporation and By-laws
3. Equal opportunity statement
4. Current Board roster
5. Staff and volunteer organizational charts
6. Budget forms indicating income and expenses for past and current year
7. Detailed program of objectives
8. Signed contract of the Annual Agreement between the agency and the Oelwein Area United Way

## ARTICLE VIII

### AGREEMENT WITH PARTICIPATING AGENCIES

Section 1. Before it shall participate in the joint fund to be raised by the United Way, each organization so participating shall agree:

- (a) To conduct no benefits, campaigns, or solicitations for financial assistance for ordinary routine purposes, nor any similar campaigns for special financial purposes within the geographic area included in the campaign of this organization except with the consent first obtained of the Board of Directors of this Organization.
- (b) Agencies shall not be allowed to solicit financial donations in the fiscal year that they are funded by the Oelwein Area United Way. **Any fund raising activities of any agency must be disclosed at the April Budget Hearings.** If after the April hearings, a special need or emergency arises where a financial solution is deemed necessary, a written appeal must be submitted to the Oelwein Area United Way Office **PRIOR TO ANY SOLICITATION.** (See attached form titled “*Emergency Needs Request Form.*” Procedures outlined on the Emergency Needs Request Form will need to be followed before special permission is granted to any agency.
- (c) To maintain a responsible management with a qualified Board of unpaid Directors or Administrative Committee which shall meet at least four (4) times a year.
- (d) To cooperate with other social agencies in preventing duplication of effort and in promoting effective service and economy of administration.
- (e) To undertake no new line of work or substantial expansion of service in the community except with the consent first obtained from the Board of Directors of the United Way.
- (f) To file with the United Way at the end of each fiscal year and otherwise, upon request, a certified copy of a complete and satisfactory audit of all accounts and holdings of the organization, and to submit to this organization such other reasonable information concerning finances, programs, etc., and in such form as the Board of Directors or Budget and Admissions Committee may require.
- (g) To abide by the rules and regulations promulgated by the Board of Directors of this organization.
- (h) Participating agencies shall agree to participate in the fund drive if the Campaign Committee so requests.
- (i) To keep complete and regular books of account open to inspection by a representative of the United Way.

Section 2. This agreement shall be binding from year to year unless the participating agency of the United Way gives written notice to the contrary, to the other party at least three (3) months before the opening date of the current financial campaign.

