# Step 1

|  |  |
| --- | --- |
|  | Are you a 501(c)3 Organization? |
|  | Do you have an active Governing Board of at least nine (9) members? |
|  | Does your Governing Board meet at least four (4) times annually? |
|  | Does your Governing Board have term limits? |
|  | Do you have an annual GAAP audit? |
|  | Do you have a strategic plan? |
|  | Is your overhead less than 25% according to your IRS Form 990? |
|  | Have you been actively serving individuals and families in Tippecanoe County, IN for at least two (2) years? |
|  | Can you demonstrate measurable results of your work to improve lives in the areas of education, income and/or health? |

# Minimal criteria to become a UW Participating Organization include (checklist on UWGL website):

If you answered yes to all of these, then contact United Way at (765) 742-9077 to discuss further criteria for United Way Participating Organizations.

# Step 2

Letter of intent from Organization to United Way including:

* Why are you interested in participating in United Way
* What do you have to offer that will help United Way with:
  + Improving lives
  + Raising funds
  + Bridging service gaps
* Copies of your latest audited financial statements and your most recent IRS Form 990

# Step 3

Send a packet of policies (possibly UW Guide) to share UW culture and policies with them. Allow them to review this to see if they are still interested.

# Step 4

Submit Formal Application consisting of Community Investment Process items and:

* Articles of Incorporation
* By-laws
* IRS Determination Letter
* Board Roster
* Organization Executive Bio (include education, experience, length of tenure)
* Organization Staff Chart
* Organization Volunteer Structure
* Client demographics, including number and percent of clients from Tippecanoe County