

NEW INITIATIVE GUIDELINES

1. BE INCORPORATED, NOT-FOR-PROFIT AND IRS TAX EXEMPT.

Explanation: The United Way has the responsibility to verify that the recipient organization has been ruled tax exempt by the Internal Revenue Service.

2. OFFERS HUMAN SERVICE PROGRAMS.

Explanation: The United Way of Van Wert County, Inc. will consider organizations with a worthy education, character building, health, or social service program.

3. PROVIDES COMMUNITY SERVICE BASED ON DOCUMENTED NEED(S).

Explanation: The agency/program should address itself to an identifiable current need, demand, or problem in the community. Services, which are supported by voluntary dollars, should be clearly defined and their impact documented by the organization.

4. NON-DISCRIMINATORY.

Explanation: All agencies are to provide equal opportunity in all areas of service and employment, both paid and volunteer. There shall be no discrimination against any person on the grounds of race, creed, religion, sex, age, handicap, national origin, or ancestry.

5. HAS AN ACTIVE, ROTATING, VOLUNTEER LEADERSHIP THAT REPRESENTS THE DIVERSE ELEMENTS OF THE COMMUNITY.

Explanation: The agency's Board of Trustees or governing body should consist of volunteers who participate in the policy-making processes, represent the diverse elements of the community, periodically rotate off the board, and meet at least quarterly.

6. HAS SOUND FINANCIAL AND PROGRAM MANAGEMENT.

Explanation: Demonstrated ability to manage the finances of the program/services in accordance with generally accepted accounting principles. Programs that run surpluses do not have the same priorities as programs that have balanced budgets. Programs that forecast operating deficits are not considered fiscally sound. What we need is a balanced budget and your job as program director/executive director is to provide that for your board, the community, and the United Way volunteers.

APPEAL PROCESS

Any organization requesting New Initiative funds from the United Way of Van Wert County, Inc., has the right to appeal the decision of the Executive Committee.

The appeal process is as follows:

All organizations are notified in writing if their New Initiative request has been approved and funded. An unsatisfied organization has 10 working days to notify the United Way office in writing that it requests an appointment with the Executive Director to review the application for funding and the factors involved regarding the Executive Committee's funding decision.

If the appointment with the Executive Director does not resolve the situation, the organization has ten (10) working days to notify the United Way office in writing that it desires a meeting with the Executive Committee.

The Executive Director, acting as Secretary for the Executive committee will notify the organization of the committee's funding decision in writing within ten (10) working days after the committee's interview with the organization.

If the situation has not yet been resolved to the organization's satisfaction, the organization must notify the United Way office within ten (10) working days after receiving correspondence regarding the committee's decision that it desires an appeal to the Board of Trustees and the Executive Committee.

The Executive Director, acting as Secretary for the Board of Trustees and the Executive Committee will notify the organization of the appeal decision in writing within ten (10) working days after the meeting.

If the situation remains unresolved, the organization will have to appeal to the judicial system.

UNITED WAY OF VAN WERT COUNTY, INC.
NEW INITIATIVE REQUEST – NEW PROGRAM

Agency Name: _____ Date: _____

Contact Name: _____

Phone: _____ Email Address: _____

1. What is your agency's mission?

2. What specific program are you requesting to be funded?

3. Is this a new program for your agency?

4. Please explain the program and how it will work.

5. How much are you requesting for this new program?

6. How will you measure the outcome of this program?

7. If your ***full*** request for United Way funds is ***not*** met, how will this program and/or clients be impacted?

8. Is there any other source of funding for this program? If so, please list the funding source and amount.

9. How do you plan to fund this program in the future?

10. Will you be applying to become a United Way agency?

11. How do you plan to promote the fact that United Way is supporting this program?

12. When are the funds needed?

13. What is your time frame for implementing this program?

14. Other comments. Please feel free to include other information you feel would be helpful or that you would like the committee to know about.